**High-Quality CPE at Low, Affordable Prices!**

Check out hundreds of FAE’s CPE offerings and register today!

Call 800-537-3635 or

For Conferences Visit:
nysscpa.org/conferences

For Seminars Visit:
nysscpa.org/seminars

For Group Discounts Email:
corp-discounts@nysscpa.org

For Customized Training Solutions Visit:
ysscpa.org/cts

---

## CPE Event

<table>
<thead>
<tr>
<th>CPE Event</th>
<th>Current Member Price</th>
<th>Early Bird Member Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference In-Person at NYSSCPA</td>
<td>$300</td>
<td>$250</td>
</tr>
<tr>
<td>Conference Webcast at NYSSCPA</td>
<td>$250</td>
<td>$200</td>
</tr>
<tr>
<td>Conference In-Person Off-Site</td>
<td>$385</td>
<td>$335</td>
</tr>
<tr>
<td>Conference Webcast Off-Site</td>
<td>$300</td>
<td>$250</td>
</tr>
<tr>
<td>8-Hour Seminar In-Person</td>
<td>$279</td>
<td>$229</td>
</tr>
<tr>
<td>8-Hour Seminar Webcast</td>
<td>$199</td>
<td>$149</td>
</tr>
<tr>
<td>4-Hour Seminar In-Person</td>
<td>$169</td>
<td>$119</td>
</tr>
<tr>
<td>4-Hour Seminar Webcast</td>
<td>$100</td>
<td>$75</td>
</tr>
</tbody>
</table>

Attend In-Person or Online

---

**Save Even More with Early Bird Discounts!**
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABOUT FAE</td>
<td>6</td>
</tr>
<tr>
<td>CPE REQUIREMENTS</td>
<td>7</td>
</tr>
<tr>
<td>CPE OFFERINGS</td>
<td>8</td>
</tr>
<tr>
<td>HOW TO REGISTER</td>
<td>9</td>
</tr>
<tr>
<td>REGISTRATION FORM</td>
<td>10-11</td>
</tr>
<tr>
<td>CUSTOMIZED TRAINING SOLUTIONS</td>
<td>12-13</td>
</tr>
<tr>
<td>FAE CONFERENCES</td>
<td>14-15</td>
</tr>
<tr>
<td>SEMINAR COURSE LISTINGS</td>
<td>16-45</td>
</tr>
<tr>
<td>ACCOUNTING</td>
<td>16-21</td>
</tr>
<tr>
<td>ADVISORY SERVICES</td>
<td>22-25</td>
</tr>
<tr>
<td>AUDITING</td>
<td>26-32</td>
</tr>
<tr>
<td>ETHICS</td>
<td>33-35</td>
</tr>
<tr>
<td>SPECIALIZED KNOWLEDGE</td>
<td>36-37</td>
</tr>
<tr>
<td>TAXATION</td>
<td>38-45</td>
</tr>
<tr>
<td>LIFELONG LEARNING RESOURCES</td>
<td>46</td>
</tr>
<tr>
<td>LOCAL CHAPTER CPE</td>
<td>47</td>
</tr>
<tr>
<td>REGISTRATION POLICIES</td>
<td>48-51</td>
</tr>
</tbody>
</table>
ABOUT FAE

YOUR TRUSTED PARTNER IN CONTINUING PROFESSIONAL EDUCATION  
ADVANCE YOUR CAREER TODAY

Established in 1972, the Foundation for Accounting Education (FAE) is a 501(c)(3) organization that administers an important strategic initiative of the New York State Society of CPAs (NYSSCPA)—to provide lifelong continuing education to certified public accountants in New York State. FAE offers a wide selection of courses in accounting, auditing, taxation, industry-specific topics, ethics and advisory services in multiple formats, including live and on-demand courses online, full- and half-day conferences and seminars, on-site learning, and 1- and 2-credit CPE sessions provided through the NYSSCPA’s technical committees.

FAE 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 hold 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: nasbaregistry.org.

FAE is approved to issue NASBA credit for Group Live and Group Internet Based courses. FAE’s sponsor number is 119366.

FAE is also a registered CPE Sponsor in the State of New York with the following sponsor number: New York, 000372.

CPE REQUIREMENTS

Am I Required to Complete CPE?
If you are a licensed CPA or PA who performs accounting, tax, financial advisory or management advisory services in New York State, for private industry, government agencies, public accounting firms, not-for-profit organizations, or academia, you are required to meet the continuing professional education (CPE) requirements.

When Am I Required to Complete CPE?
All licensed CPA’s and PAs in the State of New York are to complete all required CPE hours annually, every full calendar year (January 1-December 31).

How Many Hours of CPE Must I Complete?
- You must complete 4 contact hours of acceptable professional ethics during every 3 calendar years AND
- You must complete one of the following requirements:
  ◦ 24 contact hours concentrated in one of the recognized subject areas
  OR
  ◦ 40 contact hours in a combination of any of the recognized subject areas

What Are the Approved Subject Areas for CPE?
- Accounting  •  Advisory Services  •  Attestation  •  Auditing  •  Ethics
- Taxation  •  Specialized Knowledge and Applications Related to Specialized Industries

Full updated information on mandatory education requirements can be found at www.op.nysed.gov/prof/cpa/cpace. Contact the NYSED with any questions regarding these requirements.
CPE OFFERINGS

CPE
HOW YOU WANT IT, WHERE YOU WANT IT
CHOOSE THE OPTION THAT WORKS FOR YOU!

Conferences, Seminars and Workshops
Hear from experts and regulators in the profession, and network with your peers.

In-Person
Live conferences, seminars and networking events held across the state.

Webcast
Real-time webcasts and webinars offering quality CPE via your computer or device.

Online Self Study Free for Members!
Quality CPE taken on your time; on-demand videos and self-assessment exams.

Customized Training Solutions
Content tailored to meet your business or organization’s needs—anywhere, anytime.

HOW TO REGISTER

REGISTRATION MADE EASY

ONLINE
Conferences: nysscpa.org/conferences
Seminars: nysscpa.org/seminars
Customized Training Solutions: nysscpa.org/cts
Group Discounts: corp-discounts@nysscpa.org

PHONE
800-537-3635

FAX OR MAIL
Fill out the registration form on the next page or download it at nysscpa.org/registrationform and send by:
866-495-1354

Foundation for Accounting Education
P.O. Box 10490
Uniondale, NY 11555-0490

To register or learn more go to cpe.nysscpa.org
Important! Please use one registration form per person. Please print clearly to avoid delays due to handwriting legibility problems.

To register: Cut the form on the next page along the dotted lines, complete it, and return by mail or fax. Be sure to include your Member ID and your full payment. Mail the form, including payment or credit card information, to:

Foundation for Accounting Education
P.O. Box 10490
Uniondale, NY
11555-0490

Or fax to: 866-495-1354

You may also register online. Visit the online FAE CPE Store at nysscpa.org/fae.

Or register by phone at 800-537-3635.

Please register me for the following courses:

<table>
<thead>
<tr>
<th>Course</th>
<th>Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FAE CPE SCHEDULE 2020-2021

Method of Payment

☐ Check payable to FAE  ☐ American Express
☐ MasterCard  ☐ Visa  ☐ Discover

Credit Card No. __________________________ 

Exp. Date ______ CVV Number: ______

Cardholder’s Name ______________________

Cardholder’s Signature__________________
Build Talent. Earn CPE.

Content tailored to meet your organization’s needs—anywhere, anytime

Accounting
Advisory Services
Auditing
Regulatory Ethics
Specialized Knowledge
Tax, Technology and more

Minimize Downtime:
☑ Eliminate the loss of valuable hours away from the office

Reduce Costs:
☑ Cut unnecessary staff travel expenses with an on-site expert instructor

Full Customization:
☑ Design the course content to meet the skill-set and knowledge level of your staff

Employee/Instructor Engagement:
☑ Our instructors take a personal, interactive approach with your staff

Expertise:
☑ Our accomplished instructors are all skilled practitioners, with years of real-life experience

Webcast to Multiple Offices:
☑ Train your staff in multiple locations simultaneously

Convenient and Confidential:
☑ Your staff will be able to speak openly about proprietary issues

Start Planning Today at nysscpa.org/cts

Contact Kelly Colvin at cts@nysscpa.org | 212.719.8376
MAY 2020-JAN 2021

CONFERENCES

November 12, 2020
TAX AND FINANCIAL PLANNING FOR INDIVIDUALS CONFERENCE
Register: nysscpa.org/taxplan20
Early Bird Expires 10/22/20

November 19, 2020
ALTERNATIVE INVESTMENT FUND CONFERENCE
Register: nysscpa.org/aif20
Early Bird Expires 10/29/20

December 2, 2020
REAL ESTATE/CONSTRUCTION CONTRACTORS CONFERENCE
Register: nysscpa.org/realestate20
Early Bird Expires 11/11/20

December 3, 2020
IRS PRACTICE AND PROCEDURES CONFERENCE
Register: nysscpa.org/irs20
Early Bird Expires 11/13/20

December 8, 2020
TRUST AND ESTATE/FAMILY OFFICE CONFERENCE
Register: nysscpa.org/trustrtax20
Early Bird Expires 11/17/20

December 9, 2020
NEW YORK AND TRI-STATE TAXATION CONFERENCE
Register: nysscpa.org/nystax20
Early Bird Expires 11/18/20

December 15, 2020
EXEMPT ORGANIZATIONS CONFERENCE
Register: nysscpa.org/exemptorg20
Early Bird Expires 11/24/20

January 7, 2021
43RD ANNUAL NONPROFIT CONFERENCE (ROCHESTER)
Register: nysscpa.org/nonprofitroch21
Early Bird Expires 12/17/20

January 12, 2021
TAXATION OF FINANCIAL INSTRUMENTS AND TRANSACTIONS CONFERENCE
Register: nysscpa.org/fin21
Early Bird Expires 12/22/20

January 14, 2021
43RD ANNUAL NONPROFIT CONFERENCE (NYC)
Register: nysscpa.org/nonprofitnyc21
Early Bird Expires 12/24/20

January 28, 2021
INTERNATIONAL TAXATION CONFERENCE
Register: nysscpa.org/international21
Early Bird Expires 1/7/21

November 5, 2020
AUDITING STANDARDS CONFERENCE
Register: nysscpa.org/business20
Early Bird Expires 10/15/20

November 11, 2020
CLOSOELY HELD AND FLOW-THROUGH ENTITIES/ PARTNERSHIPS AND LLCs CONFERENCE
Register: nysscpa.org/closelyheld20
Early Bird Expires 10/21/20

To register or learn more go to nysscpa.org/conferences
Courses in this subject area focus on the development of professional knowledge and skills related to generally accepted accounting principles, comprehensive bases of accounting, and/or accounting processes and related financial reporting. Relevant subject matter includes authoritative pronouncements and accounting principles issued by the standards-setting bodies, as well as related subjects that are generally classified within the accounting discipline.

Individual programs in this subject area could cover newly promulgated financial reporting requirements/standards, accounting concepts and principles, preparation and compilation of financial statements, measurement, recognition and presentation of specific financial statement items, and internal controls for profit and nonprofit entities.

This description is provided by the New York State Education Department (NYSED).
SEPTEMBER

9/17/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: NYC
Instructor: Allen L. Fetterman

9/23/2020
RENEE RAMPULLA’S QUARTERLY ACCOUNTING AND AUDITING ROUNDTABLE
CPE Credits: 2
Location: NYC
Instructor: Renee Rampulla

OCTOBER

10/1/2020
LEASES: MASTERING THE NEW FASB REQUIREMENTS
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

10/2/2020
CFO SERIES: DEVELOPING CREDIBILITY
CPE Credits: Accounting (2), Advisory Services (6)
Location: NYC
Instructor: Bill O’Brien

10/5/2020
NOT-FOR-PROFIT FINANCIAL REPORTING: MASTERING THE UNIQUE REQUIREMENTS
CPE Credits: 8
Location: NYC
Instructor: Diane Edelstein

10/14/2020
CFO SERIES: CORPORATE PERFORMANCE MANAGEMENT
CPE Credits: 8
Location: Buffalo
Instructor: Gary Cokins

10/20/2020
GOVERNMENTAL ACCOUNTING AND AUDITING UPDATE
CPE Credits: Auditing (4), Accounting (4)
Location: NYC
Instructor: Lee Klumpp

10/22/2020
PREPARING NOT-FOR-PROFIT FINANCIAL STATEMENTS UNDER ASU NO. 2016-14
CPE Credits: 8
Location: NYC
Instructor: Jeff Lieman

10/23/2020
CONSTRUCTION CONTRACTORS: CRITICAL ACCOUNTING, AUDITING, AND TAX ISSUES
CPE Credits: Accounting (4), Auditing (2), Taxes (2)
Location: NYC
Instructor: Jeff Lieman

10/28/2020
U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

10/30/2020
LEASES: MASTERING THE NEW FASB REQUIREMENTS
CPE Credits: 8
Location: Syracuse
Instructor: Renee Rampulla

NOVEMBER

11/10/2020
U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

11/12/2020
FIDUCIARY ACCOUNTING AND TAX ISSUES OF ESTATES AND TRUSTS
CPE Credits: Accounting (4), Taxes (4)
Location: Buffalo
Instructor: Edward A. Harter

11/12/2020
FAE’S FINANCIAL STATEMENT DISCLOSURES UPDATE FOR SMALL TO MEDIUM-SIZED ENTITIES
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

11/17/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: White Plains
Instructor: Allen L. Fetterman

11/18/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: Melville
Instructor: Allen L. Fetterman

11/18/2020
LEASES: MASTERING THE NEW FASB REQUIREMENTS
CPE Credits: 8
Location: Buffalo
Instructor: Renee Rampulla

11/30/2020
FORENSIC ACCOUNTING INVESTIGATIVE PRACTICES
CPE Credits: 8
Location: NYC
Instructor: Dennis Neier

DECEMBER

12/1/2020
U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY
CPE Credits: 8
Location: Melville
Instructor: Renee Rampulla

12/3/2020
U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY
CPE Credits: 8
Location: Buffalo
Instructor: Renee Rampulla

12/10/2020
U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

To register or learn more go to nysscpa.org/seminars
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>CPE Credits</th>
<th>Location</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/3/20</td>
<td>FAE’S FINANCIAL STATEMENT DISCLOSURES UPDATE FOR SMALL TO MEDIUM-SIZED ENTITIES</td>
<td>8</td>
<td>Melville</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td></td>
<td>CFO SERIES: CASH MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CPE Credits: Accounting (6), Advisory Services (2)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Location: Buffalo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructor: Richard Karwic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/4/20</td>
<td>THE TACTICAL CFO</td>
<td>Accounting (2), Advisory Services (6)</td>
<td>Buffalo</td>
<td>Richard Karwic</td>
</tr>
<tr>
<td>12/7/20</td>
<td>U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY</td>
<td>8</td>
<td>White Plains</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td></td>
<td>LEASES: MASTERING THE NEW FASB REQUIREMENTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CPE Credits: Accounting (8)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Location: NYC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instructor: Renee Rampulla</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/8/20</td>
<td>FAE’S FINANCIAL STATEMENT DISCLOSURES UPDATE FOR SMALL TO MEDIUM-SIZED ENTITIES</td>
<td>8</td>
<td>White Plains</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>12/10/20</td>
<td>STRATEGIC CFO</td>
<td>Accounting (2), Auditing (2), Advisory Services (4)</td>
<td>Buffalo</td>
<td>Don Minges</td>
</tr>
<tr>
<td>12/14/20</td>
<td>U.S. GAAP: REVIEW FOR BUSINESS AND INDUSTRY</td>
<td>8</td>
<td>NYC</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>12/16/20</td>
<td>FAE’S FINANCIAL STATEMENT DISCLOSURES UPDATE FOR SMALL TO MEDIUM-SIZED ENTITIES</td>
<td>8</td>
<td>NYC</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>12/17/20</td>
<td>LEASES: MASTERING THE NEW FASB REQUIREMENTS</td>
<td>8</td>
<td>NYC</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>12/21/20</td>
<td>ANNUAL UPDATE: TOP GOVERNMENTAL AND NOT-FOR-PROFIT ACCOUNTING AND AUDITING ISSUES FACING CPAS</td>
<td>Auditing (4), Accounting (4)</td>
<td>NYC</td>
<td>Martin J. Birr</td>
</tr>
<tr>
<td>5/11/21</td>
<td>THE MOST CRITICAL CHALLENGES IN GOVERNMENTAL ACCOUNTING TODAY</td>
<td>4</td>
<td>NYC</td>
<td>Philip Marciano</td>
</tr>
<tr>
<td>5/19/21</td>
<td>FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN</td>
<td>Accounting (5), Auditing (2), Taxation (1)</td>
<td>NYC</td>
<td>Allen L. Fetterman</td>
</tr>
<tr>
<td>5/26/21</td>
<td>FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN</td>
<td>Accounting (5), Auditing (2)</td>
<td>Albany</td>
<td>Allen L. Fetterman</td>
</tr>
</tbody>
</table>
This subject area encompasses the various advisory services provided by accountants to clients. Traditionally, these services involve analyzing, evaluating, designing and, in some situations, implementing the systems that affect the planning, organizing and controlling of any phase of activity in a business or nonprofit enterprise. Less traditional advisory services include technology consulting, personal financial planning and small business consulting.

Relevant programs within this category could cover planning and control systems for business or not-for-profit organizations. These systems could target specific business processes such as manufacturing, marketing, human resources, research and development, and information management.

Practice management courses would be eligible for CPE credit under this category if the course content focuses on improving the delivery of services to clients. Such courses could cover organizational structure, human resources management, preparation for quality review and other client-related administrative services. Courses that focus on marketing professional services or improving profitability for the accounting firm will not be eligible for CPE credit.

This description is provided by the New York State Education Department (NYSED).
**NOVEMBER**

11/13/2020
**ANALYTICS AND BIG DATA FOR ACCOUNTANTS**
CPE Credits: 8
Location: Albany
Instructor: Renee Rampulla

11/24/2020
**ANNUAL UPDATE FOR CONTROLLERS**
CPE Credits: 8
Location: NYC
Instructor: Joselin Martin

**DECEMBER**

12/3/2020
**CFO SERIES: CASH MANAGEMENT**
CPE Credits: Accounting (6), Advisory Services (2)
Location: Buffalo
Instructor: Richard Karwic

12/4/2020
**THE TACTICAL CFO**
CPE Credits: Accounting (2), Advisory Services (6)
Location: Buffalo
Instructor: Richard Karwic

12/10/2020
**STRATEGIC CFO**
CPE Credits: Accounting (2), Advisory Services (4), Auditing (2)
Location: Buffalo
Instructor: Don Minges

12/11/2020
**CFO SERIES: EMOTIONAL INTELLIGENCE**
CPE Credits: 8
Location: Buffalo
Instructor: Don Minges

12/11/2020
**TOP 10 TECHNOLOGY RISKS AND TRENDS EVERY CPA SHOULD KNOW**
CPE Credits: Advisory Services (2), Auditing (2)
Location: NYC
Instructor: Carl F. Shultz

12/21/2020
**ANALYTICS AND BIG DATA FOR ACCOUNTANTS**
CPE Credits: 8
Location: NYC
Instructor: Renee Rampulla

**MAY**

5/19/2021
**GAINING A COMPETITIVE ADVANTAGE: CRITICAL SKILLS FOR CFOs AND CONTROLLERS**
CPE Credits: 4
Location: NYC
Instructor: Kenneth R. Greenwood

5/19/2021
**CONTROLLER/CFO UPDATE: HOT TOPICS FACING TODAY’S FINANCIAL PROFESSIONAL**
CPE Credits: 4
Location: NYC
Instructor: Kenneth R. Greenwood

5/21/2021
**ANALYTICS AND BIG DATA FOR ACCOUNTANTS**
CPE Credits: 8
Location: NYC
Instructor: James Lindell

5/28/2021
**BUSINESS LAW ESSENTIALS FOR PRACTITIONERS AND CONTROLLERS**
CPE Credits: 8
Location: NYC
Instructor: Charles A. Borek
This subject area includes the body of knowledge that deals with the basic service of the public accounting profession examining and reporting on financial statements. It also includes the examination or review of internal and administrative controls, operations and/or government programs. Courses on professional conduct and ethics are appropriately categorized in the auditing category.

Individual programs classified in this area could cover audit theory and philosophy, generally accepted auditing standards, evaluation of internal controls, substantive audit procedures, audit sampling, reporting on financial statements, review services, computer and government audits, and Securities and Exchange Commission audit activities and requirements.

This description is provided by the New York State Education Department (NYSED).
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
<th>Credits</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/13/2020</td>
<td><strong>FAE’S Compilation, Review, and Preparation of Financial Statements Update</strong></td>
<td>NYC</td>
<td>CPE Credits: 4</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>8/19/2020</td>
<td><strong>Introduction to Employee Benefit Plans</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 8</td>
<td>Melissa Critcher</td>
</tr>
<tr>
<td>8/20/2020</td>
<td><strong>Employee Benefit Plan Update and Hot Topics for Experienced Auditors</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 4</td>
<td>Melissa Critcher</td>
</tr>
<tr>
<td>8/24/2020</td>
<td><strong>Recent Frauds Occurring in Not-for-Profit Entities and Governments</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 4</td>
<td>Jeff Lieman</td>
</tr>
<tr>
<td>8/25/2020</td>
<td><strong>Applying the New Yellow Book to a Financial Statement Audit</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 4</td>
<td>Lee Klumpp</td>
</tr>
<tr>
<td>9/17/2020</td>
<td><strong>FAE’s Nonprofit Workshop with Allen Fetterman</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: Accounting (5), Auditing (2), Taxation (1)</td>
<td>Allen L. Fetterman</td>
</tr>
<tr>
<td>9/29/2020</td>
<td><strong>Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 4</td>
<td>Carl F. Shultz</td>
</tr>
<tr>
<td>9/29/2020</td>
<td><strong>Top 10 Technology Risks and Trends Every CPA Should Know</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: Advisory Services (2), Auditing (2)</td>
<td>Carl F. Shultz</td>
</tr>
<tr>
<td>9/30/2020</td>
<td><strong>Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 8</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>10/19/2020</td>
<td><strong>Advanced Topics in a Single Audit</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 8</td>
<td>Lee Klumpp</td>
</tr>
<tr>
<td>10/20/2020</td>
<td><strong>Governmental Accounting and Auditing Update</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: Accounting (4), Auditing (4), Taxation (2)</td>
<td>Lee Klumpp</td>
</tr>
<tr>
<td>10/23/2020</td>
<td><strong>Construction Contractors: Critical Accounting, Auditing, and Tax Issues</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: Accounting (4), Auditing (2), Taxation (2)</td>
<td>Jeff Lieman</td>
</tr>
<tr>
<td>10/28/2020</td>
<td><strong>Internal Controls, Risk Assessment, Audit Documentation and Best Practices</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 8</td>
<td>Melissa Critcher</td>
</tr>
<tr>
<td>10/29/2020</td>
<td><strong>FAE’s Auditing Update</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 4</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>11/10/2020</td>
<td><strong>Real-World Fraud Found in Governments and Not-For-Profits</strong></td>
<td>Location: NYC</td>
<td>CPE Credits: 8</td>
<td>Frances McKenna</td>
</tr>
<tr>
<td>11/11/2020</td>
<td><strong>FAE’s Auditing Update</strong></td>
<td>Location: Albany</td>
<td>CPE Credits: 4</td>
<td>Renee Rampulla</td>
</tr>
<tr>
<td>11/17/2020</td>
<td><strong>FAE’s Auditing Update</strong></td>
<td>Location: Buffalo</td>
<td>CPE Credits: 4</td>
<td>Renee Rampulla</td>
</tr>
</tbody>
</table>
11/17/2020
FAE’S COMPILATION, REVIEW, AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: Buffalo
Instructor: Renee Rampulla

11/17/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: White Plains
Instructor: Allen L. Fetterman

11/18/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: Melville
Instructor: Allen L. Fetterman

DECEMBER
12/2/2020
FAE’S AUDITING UPDATE
CPE Credits: 4
Location: Melville
Instructor: Renee Rampulla

12/7/2020
EMPLOYEE BENEFIT PLAN UPDATE AND HOT TOPICS FOR EXPERIENCED AUDITORS
CPE Credits: 8
Location: NYC
Instructor: Melissa Critcher

12/8/2020
INTERNAL CONTROLS, RISK ASSESSMENT, AUDIT DOCUMENTATION AND BEST PRACTICES
CPE Credits: 8
Location: NYC
Instructor: Melissa Critcher

12/9/2020
FAE’S AUDITING UPDATE
CPE Credits: 4
Location: White Plains
Instructor: Renee Rampulla

12/9/2020
FAE’S COMPILATION, REVIEW, AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: White Plains
Instructor: Renee Rampulla

12/10/2020
STRATEGIC CFO
CPE Credits: Accounting (2), Advisory Services (4), Auditing (2)
Location: Buffalo
Instructor: Don Minges

12/11/2020
AVOIDING DEFICIENCIES IN PEER REVIEWS: FOCUS ON ENGAGEMENT QUALITY
CPE Credits: 4
Location: NYC
Instructor: Carl F. Shultz

12/11/2020
TOP 10 TECHNOLOGY RISKS AND TRENDS EVERY CPA SHOULD KNOW
CPE Credits: Advisory Services (2), Auditing (2)
Location: NYC
Instructor: Carl F. Shultz

12/15/2020
FAE’S AUDITING UPDATE
CPE Credits: 4
Location: NYC
Instructor: Renee Rampulla

12/15/2020
FAE’S COMPILATION, REVIEW, AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: NYC
Instructor: Renee Rampulla

5/12/2021
FRAUD IN NOT-FOR-PROFIT ENTITIES AND GOVERNMENTS: STEALING FROM EVERYONE
CPE Credits: 8
Location: NYC
Instructor: Philip Marciano

5/19/2021
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: NYC
Instructor: Allen L. Fetterman

5/24/2021
INTRODUCTION TO EMPLOYEE BENEFIT PLANS
CPE Credits: 8
Location: NYC
Instructor: Melissa Critcher

5/25/2021
EMPLOYEE BENEFIT PLAN UPDATE AND HOT TOPICS FOR EXPERIENCED AUDITORS
CPE Credits: 8
Location: NYC
Instructor: Melissa Critcher
5/26/2021
ANNUAL UPDATE AND PRACTICE ISSUES FOR PREPARATION, COMPILATION, AND REVIEW ENGAGEMENTS
CPE Credits: 8
Location: NYC
Instructor: Michael Hamilton

5/26/2021
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: Albany
Instructor: Allen L. Fetterman

5/27/2021
APPLYING THE UNIFORM GUIDANCE IN YOUR SINGLE AUDITS
CPE Credits: 8
Location: NYC
Instructor: Rebecca Meyer

This field of study includes coursework that will increase accountants’ knowledge of ethical standards for the profession. Coursework will focus on New York State Education Law, Rules of the Board of Regents and Regulations of the Commissioner of Education. The foundation course will cover topics including introduction to ethic concepts, the psychology of moral development, judgement and values, the sociology of professions, virtue and the role of rules of ethics, public expectations of CPAs’ responsibilities, and ethical dilemmas. The role of the Board of Regents and the State Education Department, highlighting New York State law, rules and regulations, including a comparison and contrast of AICPA and New York State Society of CPAs ethics rules and enforcement of rules on ethics, will also be covered.

Ethics coursework in the specific fields of accounting, auditing and taxation will be acceptable and should include updates on New York State and AICPA ethics rules, ethical guidance in the specialty practice, information on recent litigation related to ethical concerns or issues in the area of specialization, and discussion of case studies in the field relating to ethical issues.

This description is provided by the New York State Education Department (NYSED).
AUGUST

8/18/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler

8/18/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler

NOVEMBER

11/20/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler

11/20/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler

DECEMBER

12/3/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: Albany
Instructor: Debbie A. Cutler

12/3/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: Albany
Instructor: Debbie A. Cutler

12/4/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: White Plains
Instructor: Debbie A. Cutler

12/4/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: White Plains
Instructor: Debbie A. Cutler

12/7/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: Buffalo
Instructor: Debbie A. Cutler

12/7/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: Buffalo
Instructor: Debbie A. Cutler

12/11/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: Melville
Instructor: Debbie A. Cutler

12/11/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: Melville
Instructor: Debbie A. Cutler

12/18/2020
FAE’S ETHICS UPDATE FOR PUBLIC PRACTICE
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler

12/18/2020
FAE’S ETHICS UPDATE FOR MEMBERS IN BUSINESS
CPE Credits: 4
Location: NYC
Instructor: Debbie A. Cutler
This subject area focuses on the development of professional skills and knowledge related to specialized industries and business entities. These industries are often identified by the title of an AICPA industry audit guide and employ specialized accounting principles and practices, encounter distinctive tax problems and audit issues, or require unique advisory services.

Individual programs that fall within this category could cover industry-specific accounting and auditing standards, terminology and technology, legislative or regulatory requirements, marketing or distribution systems and issues, economic structures, and sources of financing.

NOVEMBER

11/13/2020
SECURING A COMFORTABLE RETIREMENT IN THE AGE OF SPENDING
CPE Credits: Specialized Knowledge (4), Taxation (4)
Location: Buffalo
Instructor: Edward A. Harter

11/16/2020
SECURING A COMFORTABLE RETIREMENT IN THE AGE OF SPENDING
CPE Credits: Specialized Knowledge (4), Taxation (4)
Location: NYC
Instructor: Michael A. Frost

This description is provided by the New York State Education Department (NYSED).
This subject area includes local, state, federal and international tax compliance and tax planning for individuals, businesses, estates and trusts. Compliance includes tax return preparation and review, as well as Internal Revenue Service examinations, ruling requests and protests. Tax planning focuses on applying tax rules to prospective transactions, and understanding the tax implications of unusual or complex transactions. It also includes alternative tax treatments and advising clients on tax saving opportunities.

Programs offered in this subject area could cover tax research and theory, application of tax rules to different forms and types of taxpayers, specialized taxes, return preparation, tax authorities’ examinations, rulings and appeals, tax-exempt organizations, tax accounting, and employee compensation and tax deferral plans.

This description is provided by the New York State Education Department (NYSED).
TAXATION

6/26/2020
REQUIRED MINIMUM DISTRIBUTIONS: COMPLIANCE AND PLANNING
CPE Credits: 4
Location: NYC
Instructor: John M. Kilroy

6/26/2020
ADVANCED TRUST ISSUES: A ROADMAP FOR SUCCESS IN AN INCREASINGLY COMPLEX AREA
CPE Credits: 4
Location: NYC
Instructor: John M. Kilroy

AUGUST

8/10/2020
FORM 990: MASTERING ITS UNIQUE CHARACTERISTICS
CPE Credits: 8
Location: NYC
Instructor: David Peters

SEPTEMBER

9/17/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: NYC
Instructor: Allen L. Fetterman

9/21/2020
THIS YEAR’S BEST INCOME TAX, ESTATE TAX, AND FINANCIAL-PLANNING IDEAS
CPE Credits: 8
CFP Credits: 8
Location: NYC
Instructor: Robert R. Thelen

JUNE-OCT 2020

6/26/2020
THE COMPLETE GUIDE TO PAYROLL TAXES AND 1099 ISSUES
CPE Credits: 8
Location: NYC
Instructor: Robert R. Thelen

9/22/2020
THE COMPLETE GUIDE TO PAYROLL TAXES AND 1099 ISSUES
CPE Credits: 8
Location: NYC
Instructor: Robert R. Thelen

9/23/2020
SURGENT’S ANNUAL TAX-PLANNING GUIDE FOR S CORPORATIONS, PARTNERSHIPS, AND LLCs
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Robert D. Tolz

OCTOBER

10/23/2020
CONSTRUCTION CONTRACTORS: CRITICAL ACCOUNTING, AUDITING, AND TAX ISSUES
CPE Credits: Accounting (4), Auditing (2), Taxation (2)
Location: NYC
Instructor: Jeff Lieman

10/29/2020
THE BEST INDIVIDUAL INCOME TAX UPDATE COURSE BY SURGENT
CPE Credits: 8
IRS CE Credits: 8
CFP Credits: 8
Location: NYC
Instructor: Robert M. Gilwee, Jr.

NOVEMBER

11/9/2020
S CORPORATION TAXATION: ADVANCED ISSUES
CPE Credits: 4
IRS CE Credits: 4
Location: NYC
Instructor: Dennis P. Riley

11/10/2020
BUYING AND SELLING A BUSINESS: CRITICAL TAX AND STRUCTURING ISSUES
CPE Credits: 8
Location: NYC
Instructor: Dennis P. Riley

11/11/2020
IRS TAX EXAMINATIONS AND HOT ISSUES
CPE Credits: 4
IRS CE Credits: 4
Location: NYC
Instructor: Dennis P. Riley

11/11/2020
GETTING READY FOR BUSY SEASON: KEY CHANGES EVERY TAX PRACTITIONER SHOULD KNOW
CPE Credits: 4
IRS CE Credits: 4
Location: NYC
Instructor: Dennis P. Riley

11/11/2020
FIDUCIARY INCOME TAX RETURNS—FORM 1041 WORKSHOP WITH FILLED-IN FORMS
CPE Credits: 8
IRS CE Credits: 8
CFP Credits: 8
Location: Buffalo
Instructor: Edward A. Harter
11/12/2020
FIDUCIARY ACCOUNTING AND TAX ISSUES OF ESTATES AND TRUSTS
CPE Credits: Accounting (4), Taxation (4)
Location: Buffalo
Instructor: Edward A. Harter

11/17/2020
FAE’S BUSINESS TAX UPDATE
CPE Credits: 8
Location: NYC
Instructor: Sharon Kreider

11/17/2020
SOCIAL SECURITY AND MEDICARE: PLANNING FOR YOU AND YOUR CLIENTS
CPE Credits: 8
CFP Credits: 8
Location: NYC
Instructor: Michael A. Frost

11/17/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: White Plains
Instructor: Allen L. Fetterman

11/18/2020
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: Melville
Instructor: Allen L. Fetterman

11/23/2020
SECTION 199A: APPLICATIONS AND CHALLENGES
CPE Credits: 4
IRS CE Credits: 4
CFP Credits: 4
Location: NYC
Instructor: Robert M. Gilwee, Jr.

11/23/2020
SECTION 199A: SCHEDULE K-1 REPORTING BY RELEVANT PASS-THROUGH ENTITIES
CPE Credits: 4
IRS CE Credits: 4
Location: NYC
Instructor: Robert M. Gilwee, Jr.

11/24/2020
SURGENT’S TOP 10 TAX TOPICS THIS YEAR
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Robert M. Gilwee, Jr.

11/30/2020
PREPARING INDIVIDUAL TAX RETURNS FOR NEW STAFF AND PARA-PROFESSIONALS
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Nicole M. DeRosa

12/3/2020
ESTATE AND LIFE PLANNING ISSUES FOR THE MIDDLE-INCOME CLIENT
CPE Credits: 8
CFP Credits: 8
Location: NYC
Instructor: Dennis P. Riley

12/4/2020
FOUR TIERS OF LOSS LIMITATIONS: A GUIDE TO THE NEW RULES FOR PASS-THROUGH ENTITIES
CPE Credits: 4
IRS CE Credits: 4
Location: NYC
Instructor: Dennis P. Riley

12/7/2020
1040 TAX RETURN WORKSHOP—DAY 1
CPE Credits: 8
Location: NYC
Instructor: Donald Cooley

12/8/2020
1040 TAX RETURN WORKSHOP—DAY 2
CPE Credits: 8
Location: NYC
Instructor: Donald Cooley
12/10/2020
SURGENT’S ADVANCED INDIVIDUAL INCOME TAX RETURN ISSUES
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Sali L. Sheafor

12/14/2020
THE BEST S CORPORATION, LIMITED LIABILITY, AND PARTNERSHIP UPDATE COURSE BY SURGENT
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Michael E. Reilly

12/15/2020
THE BEST INDIVIDUAL INCOME TAX UPDATE COURSE BY SURGENT
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Michael E. Reilly

12/16/2020
REQUIRED MINIMUM DISTRIBUTIONS: COMPLIANCE AND PLANNING
CPE Credits: 4
Location: NYC
Instructor: John M. Kilroy

12/17/2020
HOT IRS TAX EXAMINATION ISSUES FOR INDIVIDUALS AND BUSINESSES
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: John M. Kilroy

12/21/2020
THE BEST INDIVIDUAL INCOME TAX UPDATE COURSE BY SURGENT
CPE Credits: 8
IRS CE Credits: 8
Location: Melville
Instructor: Michael E. Reilly

5/27/2021
REQUIRED MINIMUM DISTRIBUTIONS: COMPLIANCE AND PLANNING
CPE Credits: 4
Location: NYC
Instructor: Charles A. Borek

5/27/2021
ADVANCED TRUST ISSUES: A ROADMAP FOR SUCCESS IN AN INCREASINGLY COMPLEX AREA
CPE Credits: 4
Location: NYC
Instructor: Charles A. Borek

5/19/2021
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: NYC
Instructor: Allen L. Fetterman

5/26/2021
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: Albany
Instructor: Allen L. Fetterman
LIFELONG LEARNING
FOR EVERY AGE AND
CAREER STAGE

High School
COAP, the Career Opportunities in the Accounting Profession program, introduces students to the accounting profession.
Visit nysscpa.org/coap for more information.
Sponsored by the Moynihan Scholarship Fund

College
Excellence in Accounting Scholarships are available.
Apply online January–April 8 at nysscpa.org/eia.
Sponsored by the Moynihan Scholarship Fund

CPA Candidate
Save on CPA exam prep from reliable providers:
• Gleim • Roger • Surgent • Yaeger
Visit nysscpa.org/benefits.

Licensed CPA
CPE options at cpe.nysscpa.org include:
• FREE unlimited on-demand CPE
• FREE committee CPE
Member discounts on:
• Seminars offered in-person or via webcast
• Conferences developed by your committee peers

JOIN A CHAPTER NEAR YOU
Our 15 local chapters provide a home base for our members, as well as CPE and networking opportunities near your home or office. Chapter membership is complimentary.
For more info visit: nysscpa.org/chapters

EARN CPE AT YOUR LOCAL CHAPTER

1. Adirondack
2. Buffalo
3. Manhattan/Bronx
4. Mid Hudson
5. Nassau
6. Northeast
7. Queens/Brooklyn
8. Rochester
9. Rockland
10. Southern Tier
11. Staten Island
12. Suffolk
13. Syracuse
14. Utica
15. Westchester
REGISTRATION POLICIES

CANCELATION/REFUND POLICY
Cancellation requests must be made 14 days in advance of the program to receive a refund; a $50 processing fee will be charged.
For requests made less than 14 days in advance of the program; fees are not refundable. Cancellation requests will not be accepted on or after the presentation date.
All requests must be submitted in writing by email, fax, or regular mail.

TRANSFER/SUBSTITUTION POLICY
Transfers to another program or another person may be made without a charge if the request is made 14 days in advance of the program. Transfers and substitutions requested less than 14 days in advance of the program will be charged a $25 processing fee with exceptions as noted below—
  • Transfers requested on the day of the program are not permitted, unless:
    • The request is for a transfer from in-person to webcast versions of the same seminar or conference subject to the availability of seats.
    • The request is for a transfer from webcast to in-person versions of the same seminar or conference subject to the availability of seats and payment of price difference.
  • Transfers/Substitutions will not be permitted once materials have been uploaded and made available to registrants.
All requests must be submitted in writing by email, fax or regular mail.

COURSE CANCELLATION POLICY
In the event that a program must be canceled, registrants will be notified immediately and a refund and/or transfer to another event will be processed with no fee. Registrants will be notified of the rescheduled program. The NYSSCPA/FAE does not assume financial responsibility for penalties or expenses incurred by registrants who must cancel travel arrangements due to course cancellation.

LATE ARRIVALS AND EARLY DEPARTURES POLICY
Anyone who arrives at the program late or leaves early will have his or her CPE credits adjusted accordingly. CPE credit is granted at a rate of one credit hour for every 50 minutes of in-class participation.

NO-SHOW POLICY
A registrant who does not attend a program is considered a no-show and forfeits their payment and/or FAE Value Pass CPE hours. To avoid being a no-show, please follow the cancellation/transfer/substitution guidelines before the program date.

LATE REGISTRANT POLICY
All persons registering for a FAE paperless program after 7:00 a.m. the day before the program are considered late registrants. Materials for your course can be found at cpe.nysscpa.org/current-registrations, and a link is included in your registration receipt. No other notices will be sent regarding course materials.

WALK-IN POLICY
All individuals are permitted to register on the day of the seminar or conference at no additional fee, subject to the availability of seats.

Please be advised: as a walk-in, program materials will not be provided on-site. You will be able to access materials once your order is entered in the system. A link to access the materials will be included in your registration receipt.
PROGRAM MATERIALS POLICY
Program materials will be available to access online. All materials will be accessed through the myCPE portal – cpe.nysscpa.org. If materials have been posted before you register for a course, you will be alerted to this in your registration email and can access materials immediately. Otherwise, you will be notified via email that materials are ready for download, at least 3 business days in advance of the course. All notifications about material changes or updates will be made via email.

Once e-materials have been uploaded there will be no refunds, transfers or substitutions.

Program materials are designed specifically for the program and are available only to participants. The materials, or portions thereof, are not available for sale to individuals or institutions and may not be reproduced.

EMAIL POLICY
Any pertinent notifications about a CPE course will be made via email. This includes, but is not limited to course cancellations, date changes, venue changes, material updates and registration receipts. You will be notified using your email address on file with us; please make sure to keep it accurate and up-to-date. You can change this by calling customer service at 800-537-3635 or by editing your Member Profile.

AUDIO/VISUAL RELEASE POLICY AND ACKNOWLEDGMENT
By registering and attending a seminar, program, conference, session, or other event (collectively, an “Event”) sponsored by the New York State Society of CPAs, the Foundation for Accounting Education, the Moynihan Scholarship Fund, Inc., or any affiliated entity thereof (collectively, the “Society”), you acknowledge and agree that the Society has the right at the Event to record, film, photograph, or capture your voice and/or likeness in any media now available or hereafter developed and to distribute, broadcast, use, or otherwise globally to disseminate, in perpetuity, such media for any purpose whatsoever without any further approval from you or any payment to you. You further acknowledge and agree that all such media and all rights therein are the sole property of the Society. Without limiting the foregoing, the foregoing includes the right to edit such media, the right to use the media alone or together with other information, and the right to license others to use or disseminate the media.

SPECIAL REQUIREMENTS
If you plan to attend a program and will need assistance relating to a disability or have a special dietary requirement, please contact customer service at 800-537-3635, at least 5-7 business days prior to the event.

QUESTIONS/CONCERNS AND COMPLAINTS
If you have questions/concerns or complaints, please contact our offices at customerservice@nysscpa.org or call 800-537-3635.
REGISTER FOR CPE

For conferences visit nysscpa.org/conferences
For seminars visit nysscpa.org/seminars
For Customized Training Solutions visit nysscpa.org/cts

FAE is a registered CPE Sponsor with the following:

New York, 000372 
NASBA, 119366 
(Group-Live; Group-Internet Based)

The Foundation for Accounting Education (FAE) of the New York State Society of CPAs (NYSSCPA) 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.

14 Wall Street, 19th Floor 
New York, NY 10005
nysscpa.org
1-800-nysscpa