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nysscpa.org/cts

<table>
<thead>
<tr>
<th>CPE Event</th>
<th>Current Member Price</th>
<th>Early Bird Member Price</th>
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<tbody>
<tr>
<td>Conference In-Person at NYSSCPA</td>
<td>$300</td>
<td>$250</td>
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<tr>
<td>Conference Webcast at NYSSCPA</td>
<td>$250</td>
<td>$200</td>
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<tr>
<td>Conference In-Person Off-Site</td>
<td>$385</td>
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<td>8-Hour Seminar In-Person</td>
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<td>$229</td>
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<tr>
<td>4-Hour Seminar Webcast</td>
<td>$100</td>
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Attend In-Person or Online
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 CPAs 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

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
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CPE

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**REGISTER BY MAIL**

**INSTRUCTIONS**

**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.

---

**REGISTRATION FORM**

Today’s Date ___________________

Are you a CPA?  Yes ☐ No ☐

Member NYSSCPA?  Yes ☐ No ☐

Member ID No. ___________________

Member AICPA?  Yes ☐ No ☐

Member ID No. ___________________

Name (Print) ___________________

Title (Print) ___________________

Firm Address ___________________

City __________ State __ Zip ______

Telephone __________ Fax ______

E-mail (required for delivery of e-materials) ___________________

Total Amount Enclosed (please check)

Member: $ ___________________

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Nonmember: $ ___________________

If nonmember, please check here if you’d like to receive an NYSSCPA membership application. ☐

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Accounting
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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 – January 2021 Conferences

<table>
<thead>
<tr>
<th>Conference</th>
<th>Date</th>
<th>CPE Credits</th>
<th>Early Bird Expires</th>
<th>Conference Details</th>
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<tbody>
<tr>
<td><strong>Business Valuation/Litigation Services Conference</strong></td>
<td>May 18, 2020</td>
<td></td>
<td>Early Bird Expires 5/14/20</td>
<td>Register: nysscpa.org/bv20</td>
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<tr>
<td><strong>Employee Benefits Conference</strong></td>
<td>June 4, 2020</td>
<td></td>
<td>Early Bird Expires 5/14/20</td>
<td>Register: nysscpa.org/eb20</td>
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<td><strong>Buffalo Chapter Annual Summer Symposium – Day 1</strong></td>
<td>July 22, 2020</td>
<td></td>
<td>Early Bird Expires 7/2/20</td>
<td>Register: nysscpa.org/bcss1</td>
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<tr>
<td><strong>May 2020 – January 2021 Conferences</strong></td>
<td></td>
<td></td>
<td></td>
<td>8 CPE Credits</td>
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</tbody>
</table>

*Unless otherwise specified.*
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: NYC
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

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 NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: White Plains
Instructor: Allen L. Fetterman

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

11/20/2020
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
### December 2020

<table>
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<tr>
<td>12/3/2020</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>
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<td>Instructor: Richard Karwic</td>
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<tr>
<td>12/4/2020</td>
<td>THE TACTICAL CFO</td>
<td>6</td>
<td>Buffalo</td>
<td>Richard Karwic</td>
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<td>Location: White Plains</td>
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<td>FAE’S FINANCIAL STATEMENT DISCLOSURES UPDATE FOR SMALL TO MEDIUM-SIZED ENTITIES</td>
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<td>Instructor: Renee Rampulla</td>
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<td>Instructor: Don Minges</td>
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### May 2021

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<tr>
<td>5/11/2021</td>
<td>THE MOST CRITICAL CHALLENGES IN GOVERNMENTAL ACCOUNTING TODAY</td>
<td>4</td>
<td>NYC</td>
<td>Philip Marciano</td>
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<tr>
<td>5/11/2021</td>
<td>THE MOST CRITICAL CHALLENGES IN NOT-FOR-PROFIT ACCOUNTING TODAY</td>
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<tr>
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<td>5/19/2021</td>
<td>FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN</td>
<td>5</td>
<td>Albany</td>
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<td>5/26/2021</td>
<td>FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN</td>
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</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

<table>
<thead>
<tr>
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<th>Event</th>
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<th>Location</th>
<th>Instructor</th>
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<tbody>
<tr>
<td>11/13/2020</td>
<td><strong>ANALYTICS AND BIG DATA FOR ACCOUNTANTS</strong></td>
<td>8</td>
<td>Albany</td>
<td>Renee Rampulla</td>
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<td>11/24/2020</td>
<td><strong>ANNUAL UPDATE FOR CONTROLLERS</strong></td>
<td>8</td>
<td>NYC</td>
<td>Joselin Martin</td>
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### DECEMBER

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<th>Instructor</th>
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</thead>
<tbody>
<tr>
<td>12/3/2020</td>
<td><strong>CFO SERIES: CASH MANAGEMENT</strong></td>
<td>Accounting (6), Advisory Services (2)</td>
<td>Buffalo</td>
<td>Richard Karwic</td>
</tr>
<tr>
<td>12/4/2020</td>
<td><strong>THE TACTICAL CFO</strong></td>
<td>Accounting (2), Advisory Services (6)</td>
<td>Buffalo</td>
<td>Richard Karwic</td>
</tr>
<tr>
<td>12/10/2020</td>
<td><strong>STRATEGIC CFO</strong></td>
<td>Accounting (2), Auditing (2)</td>
<td>Buffalo</td>
<td>Don Minges</td>
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<tr>
<td>12/11/2020</td>
<td><strong>CFO SERIES: EMOTIONAL INTELLIGENCE</strong></td>
<td>8</td>
<td>Buffalo</td>
<td>Don Minges</td>
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<tr>
<td>12/11/2020</td>
<td><strong>TOP 10 TECHNOLOGY RISKS AND TRENDS EVERY CPA SHOULD KNOW</strong></td>
<td>Advisory Services (2), Auditing (2)</td>
<td>NYC</td>
<td>Carl F. Shultz</td>
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<td>12/21/2020</td>
<td><strong>ANALYTICS AND BIG DATA FOR ACCOUNTANTS</strong></td>
<td>8</td>
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<td>Renee Rampulla</td>
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### MAY

<table>
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<td><strong>ENTERPRISE RISK MANAGEMENT CONCEPTS AND STRATEGY FOR SMALL AND MEDIUM-SIZED COMPANIES</strong></td>
<td>4</td>
<td>NYC</td>
<td>Kenneth R. Greenwood</td>
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<tr>
<td>5/18/2021</td>
<td><strong>PROJECT MANAGEMENT FOR SMALL AND MEDIUM-SIZED ENTERPRISES</strong></td>
<td>4</td>
<td>NYC</td>
<td>Kenneth R. Greenwood</td>
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<td>5/21/2021</td>
<td><strong>ANALYTICS AND BIG DATA FOR ACCOUNTANTS</strong></td>
<td>8</td>
<td>NYC</td>
<td>James Lindell</td>
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<td>5/28/2021</td>
<td><strong>BUSINESS LAW ESSENTIALS FOR PRACTITIONERS AND CONTROLLERS</strong></td>
<td>8</td>
<td>NYC</td>
<td>Charles A. Borek</td>
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</tbody>
</table>
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).
## AUG-SEPT 2020

### 8/13/2020
**FAE’S COMPILATION, REVIEW, AND PREPARATION OF FINANCIAL STATEMENTS UPDATE**  
CPE Credits: 4  
Location: NYC  
Instructor: Renee Rampulla

### 8/19/2020
**INTRODUCTION TO EMPLOYEE BENEFIT PLANS**  
CPE Credits: 8  
Location: NYC  
Instructor: Melissa Critcher

### 8/20/2020
**EMPLOYEE BENEFIT PLAN UPDATE AND HOT TOPICS FOR EXPERIENCED AUDITORS**  
CPE Credits: 4  
Location: NYC  
Instructor: Melissa Critcher

### 8/24/2020
**RECENT FRAUDS OCCURRING IN NOT-FOR-PROFIT ENTITIES AND GOVERNMENTS**  
CPE Credits: 4  
Location: NYC  
Instructor: Jeff Lieman

### 8/25/2020
**APPLYING THE NEW YELLOW BOOK TO A FINANCIAL STATEMENT AUDIT**  
CPE Credits: 4  
Location: NYC  
Instructor: Jeff Lieman

### 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

#### 9/29/2020
**AVOIDING DEFICIENCIES IN PEER REVIEWS: FOCUS ON ENGAGEMENT QUALITY**  
CPE Credits: 4  
Location: NYC  
Instructor: Carl F. Shultz

#### 9/29/2020
**TOP 10 TECHNOLOGY RISKS AND TRENDS EVERY CPA SHOULD KNOW**  
CPE Credits: Advisory Services (2), Auditing (2)  
Location: NYC  
Instructor: Carl F. Shultz

#### 9/30/2020
**FRAUD UPDATE: DETECTING AND PREVENTING THE TOP TEN FRAUD SCHEMES**  
CPE Credits: 8  
Location: NYC  
Instructor: Renee Rampulla

### OCTOBER

#### 10/19/2020
**ADVANCED TOPICS IN A SINGLE AUDIT**  
CPE Credits: 8  
Location: NYC  
Instructor: Lee Klumpp

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

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

#### 10/28/2020
**INTERNAL CONTROLS, RISK ASSESSMENT, AUDIT DOCUMENTATION AND BEST PRACTICES**  
CPE Credits: 8  
Location: NYC  
Instructor: Melissa Critcher

### OCT-NOV 2020

#### 10/29/2020
**FAE’S COMPILATION, REVIEW, AND PREPARATION OF FINANCIAL STATEMENTS UPDATE**  
CPE Credits: 4  
Location: Syracuse  
Instructor: Renee Rampulla

#### 11/10/2020
**REAL-WORLD FRAUD FOUND IN GOVERNMENTS AND NOT-FOR-PROFITS**  
CPE Credits: 8  
Location: NYC  
Instructor: Frances McKenna

#### 11/11/2020
**FAE’S AUDITING UPDATE**  
CPE Credits: 4  
Location: Albany  
Instructor: Renee Rampulla

#### 11/17/2020
**FAE’S AUDITING UPDATE**  
CPE Credits: 4  
Location: Buffalo  
Instructor: Renee Rampulla
11/17/2020
FAE’S COMPILED 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

1/1/2020
FAE’S COMPILED REVIEW AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: White Plains
Instructor: Allen L. Fetterman

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

12/2/2020
FAE’S COMPILED REVIEW AND PREPARATION OF FINANCIAL STATEMENTS 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 COMPILED REVIEW AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: White Plains
Instructor: Renee Rampulla

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 COMPILED REVIEW AND PREPARATION OF FINANCIAL STATEMENTS UPDATE
CPE Credits: 4
Location: NYC
Instructor: Renee Rampulla

12/21/2020
ANNUAL UPDATE: TOP GOVERNMENTAL AND NOT-FOR-PROFIT ACCOUNTING AND AUDITING ISSUES FACING CPAS
CPE Credits: Accounting (4), Auditing (4)
Location: NYC
Instructor: Martin Birr

12/22/2020
FAU’S UPDATE: DETECTING AND PREVENTING THE TOP TEN FRAUD SCHEMES
CPE Credits: 8
Location: NYC
Instructor: Renee Rampulla

MAY
5/12/2021
FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN
CPE Credits: Accounting (5), Auditing (2), Taxation (1)
Location: NYC
Instructor: Allen L. Fetterman

5/19/2021
FAE’S AUDITING UPDATE
CPE Credits: 4
Location: NYC
Instructor: Melissa Critcher

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

5/25/2021
FAE’S AUDITING UPDATE
CPE Credits: 4
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.

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).
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
9/22/2020
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

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.

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

OCT-NOV 2020

JUNE-OCT 2020

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 S CORPORATION, LIMITED LIABILITY, AND PARTNERSHIP UPDATE COURSE BY SURGENT
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Robert M. Gilwee, Jr.

11/2/2020
ANNUAL TAX UPDATE: INDIVIDUALS AND SOLE PROPRIETORS
CPE Credits: 8
Location: NYC
Instructor: Douglas E. Warren

11/9/2020
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

11/10/2020
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

11/2/2020
INCOME TAX PLANNING
CPE Credits: 8
Location: NYC
Instructor: Robert J. Feenan

11/9/2020
KEY PARTNERSHIP AND S CORPORATION TAX PLANNING STRATEGIES
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
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Credits</th>
<th>Location</th>
<th>Instructor</th>
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<tbody>
<tr>
<td>11/12/2020</td>
<td>FIDUCIARY ACCOUNTING AND TAX ISSUES OF ESTATES AND TRUSTS</td>
<td>CPE Credits: Accounting (4), Taxation (4)</td>
<td>Buffalo</td>
<td>Edward A. Harter</td>
</tr>
<tr>
<td>11/16/2020</td>
<td>FAE’S INDIVIDUAL TAX UPDATE</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Sharon Kreider</td>
</tr>
<tr>
<td>11/16/2020</td>
<td>SECURING A COMFORTABLE RETIREMENT IN THE AGE OF SPENDING</td>
<td>CPE Credits: Specialized Knowledge (4), Taxation (4)</td>
<td>Melville</td>
<td>Allen L. Fetterman</td>
</tr>
<tr>
<td>11/17/2020</td>
<td>FAE’S BUSINESS TAX UPDATE</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Robert M. Gilwee, Jr.</td>
</tr>
<tr>
<td>11/17/2020</td>
<td>SOCIAL SECURITY AND MEDICARE: PLANNING FOR YOU AND YOUR CLIENTS</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Michael A. Frost</td>
</tr>
<tr>
<td>11/18/2020</td>
<td>FAE’S NONPROFIT WORKSHOP WITH ALLEN FETTERMAN</td>
<td>CPE Credits: Accounting (5), Auditing (2), Taxation (1)</td>
<td>Melville</td>
<td>Allen L. Fetterman</td>
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<td>11/23/2020</td>
<td>SECTION 199A: SCHEDULE K-1 REPORTING BY RELEVANT PASS-THROUGH ENTITIES</td>
<td>CPE Credits: 4</td>
<td>NYC</td>
<td>Dennis P. Riley</td>
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<tr>
<td>12/3/2020</td>
<td>ESTATE AND LIFE PLANNING ISSUES FOR THE MIDDLE-INCOME CLIENT</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Dennis P. Riley</td>
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<tr>
<td>12/4/2020</td>
<td>SECURING A COMFORTABLE RETIREMENT IN THE AGE OF SPENDING</td>
<td>CPE Credits: Specialized Knowledge (4), Taxation (4)</td>
<td>NYC</td>
<td>Dennis P. Riley</td>
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<td>12/4/2020</td>
<td>THE TOP FIVE TAX ISSUES IN DEALING WITH LLCs AND PARTNERSHIPS</td>
<td>CPE Credits: 4</td>
<td>NYC</td>
<td>Donald Cooley</td>
</tr>
<tr>
<td>12/7/2020</td>
<td>1040 TAX RETURN WORKSHOP—DAY 1</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Donald Cooley</td>
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<td>12/8/2020</td>
<td>1040 TAX RETURN WORKSHOP—DAY 2</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Donald Cooley</td>
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**DECEMBER**

<table>
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<th>Credits</th>
<th>Location</th>
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<tr>
<td>12/1/2020</td>
<td>FORM 1120S BOOT CAMP: STEP-BY-STEP PREPARATION WITH COMPLETED FORMS</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Nicole M. DeRosa</td>
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<tr>
<td>12/2/2020</td>
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<td>CPE Credits: 8</td>
<td>Melville</td>
<td>Allen L. Fetterman</td>
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<tr>
<td>12/2/2020</td>
<td>FAE’S BUSINESS TAX UPDATE</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Robert E. Greenberg</td>
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<td>12/3/2020</td>
<td>ESTATE AND LIFE PLANNING ISSUES FOR THE MIDDLE-INCOME CLIENT</td>
<td>CPE Credits: 8</td>
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<td>Robert E. Greenberg</td>
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<td>12/4/2020</td>
<td>SECURING A COMFORTABLE RETIREMENT IN THE AGE OF SPENDING</td>
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<tr>
<td>12/8/2020</td>
<td>1040 TAX RETURN WORKSHOP—DAY 2</td>
<td>CPE Credits: 8</td>
<td>NYC</td>
<td>Donald Cooley</td>
</tr>
</tbody>
</table>

To register or learn more go to nysscpa.org/seminars
12/10/2020
SURGER’S ADVANCED INDIVIDUAL INCOME TAX RETURN ISSUES
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Sali L. Sheafor

12/10/2020
THE BEST S CORPORATION, LIMITED LIABILITY, AND PARTNERSHIP UPDATE COURSE BY SURGER
CPE Credits: 8
IRS CE Credits: 8
Location: White Plains
Instructor: Robert M. Gilwee, Jr.

12/10/2020
THE BEST INDIVIDUAL INCOME TAX UPDATE COURSE BY SURGER
CPE Credits: 8
IRS CE Credits: 8
Location: White Plains
Instructor: Robert M. Gilwee, Jr.

12/14/2020
THE BEST S CORPORATION, LIMITED LIABILITY, AND PARTNERSHIP UPDATE COURSE BY SURGER
CPE Credits: 8
IRS CE Credits: 8
Location: NYC
Instructor: Sali L. Sheafor

12/15/2020
THE BEST INDIVIDUAL INCOME TAX UPDATE COURSE BY SURGER
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

12/16/2020
ADVANCED TRUST ISSUES: A ROADMAP FOR SUCCESS IN AN INCREASINGLY COMPLEX AREA
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 SURGER
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
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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.
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