

Date	Begin	End	Code	Course Title	CPE Hours	CPE Category	CFP	Yellow Book	Level	Seminar Leader	Vendor
09/09/21	9:00 AM	12:30 PM	21115	PPP Loan Forgiveness, ERC & Form 941X for 2020 & 2021 after Notice 2021-49	4	Taxes	No	No	Update	Gauthier, Lucien P. Esq.	Boston Tax Institute
09/17/21	9:00 AM	11:15 AM	21116	New Draft Schedules K-2 & K-3 For Forms 1065, 1120-S & 8865	2	Taxes	No	No	Update	Vacovec, Kenneth J. Esq.	Boston Tax Institute
09/22/21	1:00 PM	3:00 PM	21110	Business Valuation and Financial Issues in Rhode Island Family Court	2	Specialized Knowledge	No	No	Overview	Forte, Michael B. Jr.	RI Society of CPAs
09/22/21	1:00 PM	4:30 PM	21114	2021 FASB, SSARS and SAS Update and Review	4	Accounting, Auditing	No	No	Update	Fustolo, Steven C.	Boston Tax Institute
09/23/21	9:00 AM	12:30 PM	21117	Multi-State Taxation After Wayfair	4	Taxes	No	No	Update	Mello, Inez M.	Boston Tax Institute
09/30/21	8:30 AM	4:00 PM	21025	Accounting Standards Update for Closely Held Companies (2021)	8	Accounting, Auditing and Assurance	No	No	Update	Thompson, Ray	
10/01/21	8:30 AM	2:00 PM	21026	A Practical Ethics Update for CPAs, 2021 Edition	6	Ethics	No	No	Update	Thompson, Ray	
10/20/21	1:00 PM	3:00 PM	21111	The Market Approach to Business Valuation	2	Specialized Knowledge	No	No	Overview	Caruso, Greg	RI Society of CPAs
10/21/21	8:45 AM	12:15 PM	21101	Ethics: The Many Faces of Fraud: Why Good People Make Dumb Choices	4	Ethics	No	No	Basic	Gallagher, Chuck	Business Learning Institute
10/28/21	8:45 AM	4:30 PM	21075	Semi Senior Staff Training	16	Auditing, Staff Training	No	No	Intermediate	Kennedy, Bonnie	AHI Associates
11/01/21	8:00 AM	4:00 PM	21098	Don Farmer's 2021 Individual Income Tax Update	8	Taxes	No	No	Update	Harden, J. William	Business Learning Institute
11/03/21	8:00 AM	4:00 PM	21099	Don Farmer's 2021 Corporate/Business Income Tax Update	8	Taxes	No	No	Update	Harden, J. William	Business Learning Institute
11/03/21	8:30 AM	4:00 PM	21003	NEW 2021 Accounting, SSARS and Auditing Update	8	Accounting & Auditing	No	No	Update	Donti, Leah	Advantage Montreal Seminars
11/04/21	8:30 AM	4:00 PM	21005	NEW Applying the New Lease Standard: Practice Issues, Real-life Cases & Implementation	8	Accounting	No	No	Intermediate	Donti, Leah	Advantage Montreal Seminars
11/04/21	8:45 AM	4:30 PM	21076	Beginner In Charge Level 3	16	Auditing, Staff Training	No	No	Intermediate	Kennedy, Bonnie	AHI Associates
11/08/21	8:45 AM	4:30 PM	21079	2021 FASB & AICPA Update	8	Accounting, Auditing	No	No	Update	Heaslip, Kenneth	Kaplan Performance Academy
11/08/21	9:00 AM	12:40 PM	21077	Top Business Tax Planning Strategies	2	Taxes, Accounting	No	No	Basic	Stives, Douglas	Surgent McCoy CPE
11/08/21	11:00 AM	12:40 PM	21078	Top Individual Tax Planning Strategies	2	Taxes, Accounting	No	No	Basic	Stives, Douglas	Surgent McCoy CPE
11/15/21	8:45 AM	12:15 PM	21080	Compilation and Review Practice Guide	4	Auditing, Accounting	No	No	Basic	Newhard, Jim	Kaplan Performance Academy
11/15/21	9:00 AM	4:30 PM	21081	The Best Individual Income Tax Update Course by Surgent	8	Taxation	Yes	No	Update	Taylor, William	Surgent McCoy CPE
11/16/21	8:45 AM	4:30 PM	21082	Income Tax Planning	8	Taxes	No	No	Advanced	Murphy, William	AICPA
11/16/21	9:00 AM	4:30 PM	21083	This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas	8	Taxes	Yes	No	Intermediate	Taylor, William	Surgent McCoy CPE
11/17/21	1:00 PM	3:00 PM	21112	An Overview of Recent Estate and Gift Tax Court Cases	2	Specialized Knowledge	No	No	Overview	Porcaro, Gregory A. Sr.	RI Society of CPAs
11/18/21	8:45 AM	4:30 PM	21084	Advanced Auditing of HUD-Assisted Projects	8	Governmental Auditing	No	Yes	Advanced	Bedwell, Robert	AICPA
11/19/21	8:00 AM	4:00 PM	21100	Don Farmer's 2021 Federal Tax Update	8	Taxes	No	No	Update	Harden, J. William	Business Learning Institut
11/30/21	9:00 AM	10:40 PM	21085	After the SECURE Act: Comparing and Contrasting Retirement Plans for Small and Medium Sized Businesses	2	Taxes, Accounting	No	No	Intermediate	Frost, Michael	Surgent McCoy CPE, LLC
11/30/21	11:00 AM	12:40 PM	21087	Reducing a Business Owner Client's Exposure to Social Security and Self-Employment Taxes	2	Taxes, Accounting	No	No	Intermediate	Massoud, Edward T.	Surgent McCoy CPE, LLC
11/30/21	1:15 PM	4:45 PM	21086	IRS Tax Examinations and Hot Issues	4	Taxes, Accounting	No	No	Intermediate	Frost, Michael	Surgent McCoy CPE, LLC
12/01/21	9:00 AM	4:30 PM	21088	Latest Developments in Nonprofit Accounting and Auditing	8	Accounting & Auditing, Gov't Accounting	No	Yes	Update	Thomas, Marci	Surgent McCoy CPE, LLC
12/03/21	9:00 AM	10:40 AM	21091	What Tax Practitioners Need to Know About Medicare	2	Taxes, Accounting	No	No	Basic	Kilroy, John	Surgent McCoy CPE, LLC
12/03/21	11:00 AM	12:40 PM	21090	Strategies for Maximizing Social Security Benefits	2	Taxes, Accounting	No	No	Intermediate	Kilroy, John	Surgent McCoy CPE, LLC
12/03/21	1:15 PM	4:45 PM	21089	Securing a Comfortable Retirement	4	Specialized Knowledge, Taxes	No	No	Intermediate	Kilroy, John	Surgent McCoy CPE, LLC
12/06/21	8:45 AM	12:15 PM	21092	Professional Ethics Update	4	Ethics	No	No	Basic	Heaslip, Kenneth	Kaplan Performance Academy
12/07/21	8:45 AM	4:30 PM	21093	Surgent's Federal Tax Camp (SATC)	8	Taxes, Taxation	Yes	No	Update	Smith, Susan	Surgent McCoy CPE, LLC
12/13/21	8:30 AM	4:00 PM	21004	NEW 2021 Accounting, SSARS and Auditing Update	8	Accounting & Auditing	No	No	Update	Donti, Leah	Advantage Montreal Seminars
12/13/21	8:45 AM	4:30 PM	21094	Nonprofit Industry Update	8	Accounting, Governmental Auditing	No	Yes	Update	Lee, Rebecca M.	Kaplan Performance Academy
12/14/21	8:30 AM	4:00 PM	21006	NEW Fraud Update for Turbulent Times	8	Auditing	No	No	Basic	Donti, Leah	Advantage Montreal Seminars
12/15/21	1:00 PM	3:00 PM	21113	Valuation of Privately-Held Promissory Notes	2	Specialized Knowledge	No	No	Overview	Cacchiotti, John A. Jr.	RI Society of CPAs