OSCPA
Oregon Society of CPAs

Your Selections: Keyword: **estate**

Surgent's Introduction to Forensic Accounting (4 hours)

October 1, 2026 10:00am - 1:30pm PDT Online 4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Fiduciary Accounting for Estates and Trusts (4 hours)

October 7, 2026 11:00am - 2:37pm PDT Online 4.00 Credits $ Member Price: $149

Financial accounting for trusts and estates is one of the least understood branches of accounting. It is not particularly concerned with recording income and expenses but is obsessed with determining whether receipts and expenditures are assigned to income or principal/corpus. This course will dive into this tricky area and provide a reporting guide for fiduciary accounting.

Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

October 9, 2026 6:00am - 9:44am PDT Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

Fiduciary Accounting Part 2: Tools, Rules and Relationship to Tax 26-27 (2 hours)

October 19, 2026 10:00am - 12:00pm PDT Online 2.00 Credits $ Member Price: $99

To properly account for estates and non-grantor trusts, an advisor must understand the statutory requirements to account, the proper classification of revenue and expenses in a chart of account and the importance of provisions in the estate planning document. Additionally, the differences and similarities to fiduciary taxation must be understood. Be sure to register for all four parts: Fiduciary Accounting Part 1: Fiduciary Duty Basics & Authority Fiduciary Accounting Part 2: Tools, Rules and Relationship to Tax Fiduciary Accounting Part 3: Special Accounting Elections & Distributions from Entities Fiduciary Accounting Part 4: The New Frontier (Total Return Trusts)

Surgent's Introduction to Forensic Accounting (4 hours)

November 2, 2026 10:00am - 1:30pm PST Online 4.00 Credits $ Member Price: $159

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Fiduciary Accounting for Estates and Trusts (4 hours)

November 3, 2026 9:00am - 12:37pm PST Online 4.00 Credits $ Member Price: $149

Financial accounting for trusts and estates is one of the least understood branches of accounting. It is not particularly concerned with recording income and expenses but is obsessed with determining whether receipts and expenditures are assigned to income or principal/corpus. This course will dive into this tricky area and provide a reporting guide for fiduciary accounting.

Anti-Money Laundering Warning Signs and Mitigation Techniques (2 hours)

November 7, 2026 7:00am - 8:51am PST Online 2.00 Credits $ Member Price: $85

Could you imagine a drug dealer using a credit-card terminal to accept payment? How about someone paying for a television they bought off the back of a truck with a personal check? Hard to imagine, right? Most criminals conduct their business in cash. For years, criminals kept their ill-gotten gains in cash and used it to pay for everything from real estate to jewelry to things such as private school tuition. This prompted governments around the globe to pass laws prohibiting large cash payments or, at the least, requiring such payments to be reported. These laws created the need for criminals to conceal the true source of the money or to "launder" it. To combat these threats, laws, and regulations have been enacted in countries around the globe that make financial services firms, and in some cases individuals, responsible for preventing or stopping money laundering. Within this course, we explore AML warning signs and potential mitigation techniques companies and professionals can take to help eliminate money laundering.

Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

November 10, 2026 10:00am - 1:44pm PST Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Fiduciary Accounting for Estates and Trusts (4 hours)

December 1, 2026 7:00am - 10:37am PST Online 4.00 Credits $ Member Price: $149

Financial accounting for trusts and estates is one of the least understood branches of accounting. It is not particularly concerned with recording income and expenses but is obsessed with determining whether receipts and expenditures are assigned to income or principal/corpus. This course will dive into this tricky area and provide a reporting guide for fiduciary accounting.

Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

December 2, 2026 6:00am - 9:44am PST Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Surgent's Introduction to Forensic Accounting (4 hours)

December 8, 2026 10:30am - 2:00pm PST Online 4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Anti-Money Laundering Warning Signs and Mitigation Techniques (2 hours)

January 6, 2027 10:00am - 11:51am PST | Online | 2.00 Credits | $ Member Price: $85

Could you imagine a drug dealer using a credit-card terminal to accept payment? How about someone paying for a television they bought off the back of a truck with a personal check? Hard to imagine, right? Most criminals conduct their business in cash. For years, criminals kept their ill-gotten gains in cash and used it to pay for everything from real estate to jewelry to things such as private school tuition. This prompted governments around the globe to pass laws prohibiting large cash payments or, at the least, requiring such payments to be reported. These laws created the need for criminals to conceal the true source of the money or to "launder" it. To combat these threats, laws, and regulations have been enacted in countries around the globe that make financial services firms, and in some cases individuals, responsible for preventing or stopping money laundering. Within this course, we explore AML warning signs and potential mitigation techniques companies and professionals can take to help eliminate money laundering.

Surgent's Introduction to Forensic Accounting (4 hours)

January 7, 2027 6:00am - 9:30am PST | Online | 4.00 Credits | $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Fiduciary Accounting for Estates and Trusts (4 hours)

January 11, 2027 11:00am - 2:37pm PST | Online | 4.00 Credits | $ Member Price: $149

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Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

January 14, 2027 10:00am - 1:44pm PST Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Fiduciary Accounting for Estates and Trusts (4 hours)

February 1, 2027 9:00am - 12:37pm PST Online 4.00 Credits $ Member Price: $149

Financial accounting for trusts and estates is one of the least understood branches of accounting. It is not particularly concerned with recording income and expenses but is obsessed with determining whether receipts and expenditures are assigned to income or principal/corpus. This course will dive into this tricky area and provide a reporting guide for fiduciary accounting.

Surgent's Introduction to Forensic Accounting (4 hours)

February 3, 2027 10:00am - 1:30pm PST Online 4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

February 16, 2027 6:00am - 9:44am PST Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Surgent's Introduction to Forensic Accounting (4 hours)

February 22, 2027   6:00am - 9:30am PST   Online   4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Fiduciary Accounting for Estates and Trusts (4 hours)

March 8, 2027   7:00am - 10:37am PST   Online   4.00 Credits $ Member Price: $149

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Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

March 9, 2027   10:00am - 1:44pm PST   Online   4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Surgent's Introduction to Forensic Accounting (4 hours)

March 15, 2027 6:00am - 9:30am PDT Online 4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.

Fiduciary Accounting for Estates and Trusts (4 hours)

April 5, 2027 11:00am - 2:37pm PDT Online 4.00 Credits $ Member Price: $149

Financial accounting for trusts and estates is one of the least understood branches of accounting. It is not particularly concerned with recording income and expenses but is obsessed with determining whether receipts and expenditures are assigned to income or principal/corpus. This course will dive into this tricky area and provide a reporting guide for fiduciary accounting.

Fiduciary Accounting & Tax Planning for Estates & Trusts (4 hours)

April 8, 2027 6:00am - 9:44am PDT Online 4.00 Credits $ Member Price: $149

This course will review the fundamentals of fiduciary accounting and provide a reporting guide for determining whether receipts and expenditures are assigned to income or principal/corpus. Critical issues, rules, and special opportunities when preparing your clients' Form 1041 U.S. Income Tax Return for Estates and Trusts will be examined, including what is considered taxable income and allowable deductions. Planning and potential pitfalls will also be explored. This course only qualifies for 2 IRS credits. *Please Note: If you need credit reported to the IRS for this IRS approved program, please download the IRS CE request form on the Course Materials Tab and submit to kori.herrera@acpen.com

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Surgent's Introduction to Forensic Accounting (4 hours)

April 9, 2027 10:30am - 2:00pm PDT Online 4.00 Credits $ Member Price: $159

Forensic accounting encompasses fraud investigation and prevention, as well as a wide variety of functions in litigation. Forensic accountants provide services ranging from serving as an expert witness, to litigation consultant and bankruptcy trustee. As our economy grows more complex, the need for forensic accountants grows as well. One critical role of the forensic accountant is exposing and examining financial fraud. Technology expands the way companies conduct business; however, technology also provides greater opportunities for those willing to commit fraud. Forensic accountants rely on their skills in accounting, coupled with their investigative skills, to explain to clients, courts, and jurors how fraudulent schemes occur and the effect caused by fraud. Forensic accountants also provide expert opinions in calculating damages in litigation and administering bankruptcy estates, as well as a host of other services.