



# The Resource

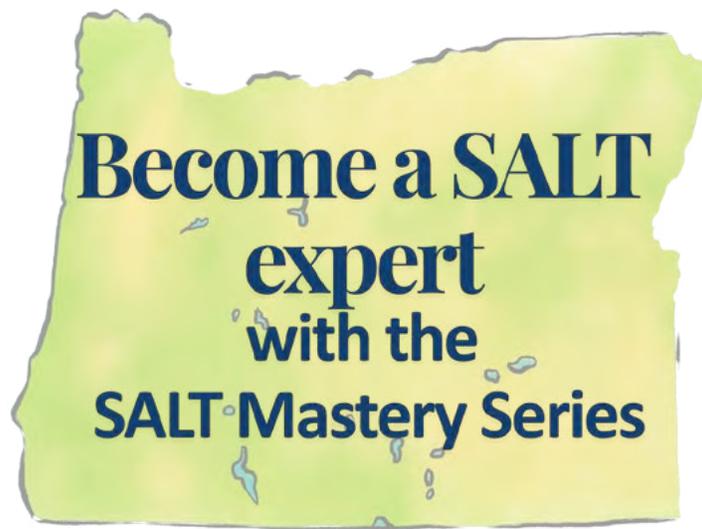
Your Professional Development Catalog — Spring/Summer 2025

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A publication of the Oregon Society of CPAs



The knowledge and training you need to succeed.



**Elevate your expertise, stay ahead of legislative changes, and gain practical insights tailored for tax professionals.** Join us for an in-depth exploration of advanced techniques, guided by industry-leading experts. Don't miss this opportunity to master the complexities of SALT and transform your tax practice. Sign up today and take the first step towards becoming a SALT expert!

**June 25, 2025 - Oregon's Pass-Through Entity Elective Tax (PTE-E) (2 hours - afternoon) - Webcast**

CPE: 2 / Level: 3 (Advanced) / Webcast - #W80797

**July 30, 2025 - Oregon Corporate Activity Tax: Form & Substance Matter! Includes Agency Relationship Audit Update (2 hours) - NEW! - Webcast**

CPE: 2 / Level: 4 (Update) / Webcast - #W80819

**September 24, 2025 - Protecting Yourself & Your Clients: Understanding the Implications of Remote Work & Licensing Requirements (2 hours) - Webcast**

CPE: 2 / Level: 2 (Intermediate) / Webcast - #W80839

**October 22, 2025 - Income Tax Nexus and Apportionment (2 hours - morning) - Webcast**

CPE: 2 / Level: 2 (Intermediate) / Webcast - #W80848

**November 19, 2025 - Federal & State Audit Defense: Do They Really Need All Those Documents? (2 hours - afternoon) - NEW! - Webcast**

CPE: 2 / Level: 2 (Intermediate) / Webcast - #W80886

**December 10, 2025 - Oregon's Pass-Through Entity Elective Tax (PTE-E): Don't Miss a Deduction (2 hours - afternoon) - Webcast**

CPE: 2 / Level: 3 (Advanced) / Webcast - #W80899

**December 17, 2025 - Washington B&O and Sales Tax Including Focus on Investment Income (2 hours - morning) - NEW! - Webcast**

CPE: 2 / Level: 2 (Intermediate) / Webcast - #W80910

**January 23, 2026 - Multnomah County / City of Portland Taxation Update (2 hours - morning) - Webcast**

CPE: 2 / Level: 4 (Update) / Webcast - #W80928

**January 23, 2026 - City of Portland, Multnomah County, and Metro Taxes: Practitioner Perspectives (2 hours - late morning) - Webcast**

CPE: 2 / Level: 4 (Update) / Webcast - #W80929

**January 23, 2026 - Oregon Department of Revenue Update (2 hours - afternoon) - Webcast**

CPE: 2 / Level: 4 (Update) / Webcast - #W80927



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## SPRING/SUMMER 2025

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# Welcome

Welcome to another year of OSCPAs Professional Development. It is our honor to serve your professional needs and to support you in your career growth. As you may know, OSCPAs CPE is unique. Curriculum is developed by your professional peers here in Oregon. The OSCPAs Professional Development (CPE) Strategic Committee is a hearty and committed group of volunteers who review professional trends and analyze member feedback from surveys and participant course evaluations. Your success is their priority.

In this catalog you will note OSCPAs-Select™ curriculum. OSCPAs-Select™ courses are curated for you. We are pleased to offer you this compelling variety of local and national speakers and CPE producers who are highly knowledgeable and recognized for their subject matter expertise. Each OSCPAs-Select™ course is designed to provide the highest quality and the most relevant and timely information to meet your needs.

## How to use this catalog.

### Register from this interactive digital catalog.

- Access the online catalog including our extensive catalog of vendor-produced webcasts and on-demand/self-study learning options at [www.orcpa.org/cpe](http://www.orcpa.org/cpe)
- Have questions? OSCPAs staff members are ready to assist you. Please reach out at 503-641-7200 / 800-255-1470, ext. 3; email: [profdev@orcpa.org](mailto:profdev@orcpa.org).
- Thank you for selecting OSCPAs as your educational provider of choice! Our promise is to provide you with quality educational opportunities to meet your professional development needs.
- Have a suggestion for a class? We want to hear from you! Also watch for our yearly CPE survey to tell us which topics are important to you.



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## International Tax for Small and Midsized Businesses: A Practitioner's Guide to Issue Spotting (1 hour – late morning)

- May 15, 2025 – Webcast - #W80945

International tax is often discussed in the context of large corporations, but small and midsized businesses face unique challenges that require a different approach. This program is designed for practitioners serving small and midsized businesses, providing a practical overview of key international tax issues, risk areas, and compliance concerns. Gain the tools to identify potential pitfalls, navigate essential regulations, and ensure your clients stay compliant while optimizing their tax strategies.

**Member Fee:** \$49 / **Nonmember Fee:** \$69

**CPE:** 1 / **Level:** 1 (Basic)

**Producer:** Oregon Society of CPAs



To register, scan the QR code or visit [www.orcpa.org/cpe/W80945](http://www.orcpa.org/cpe/W80945)

# Professional Conduct & Ethics



According to Oregon Board of Accountancy's OAR 801-040-010: Each biennial renewal period, all Active and Inactive licensees must take four hours of ethics CPE. For the most current Oregon Administrative Rules (AORs), refer to the BOA website: <https://tinyurl.com/OR-BOA-Rules>.

## **Oregon Ethics and New Developments (4 hours - morning)**

- May 8, 2025 - Webcast Replay\* - #W80734
- June 11, 2025 - Webcast - #W80767
- June 23, 2025 - Webcast Replay\* - #W80785
- October 27, 2025 - Webcast Replay\* - #W80850
- November 19, 2025 - Webcast Replay\* - #W80884
- December 4, 2025 - Webcast - #W80893
- January 27, 2026 - Webcast Replay\* - #W80930

Producer: Mark Hugh PLLC

\*Webcast Replay Producer: ACPEN & Mark Hugh PLLC

## **Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning)**

- May 19, 2025 - Webcast - #W80741
- November 10, 2025 - In-person - OSCPA Center, Beaverton - #11243
- November 10, 2025 - Webcast - #W80875

Producer: Rigos Professional Education Programs, Ltd.

## **2025 Oregon Ethics Update (4 hours - morning)**

- May 28, 2025 - Webcast Replay - #W80744
- Producer: Galasso Learning Solutions LLC

## **Oregon & Washington Ethics 2025 (4 hours - morning)**

- June 3, 2025 - Webcast - #W80752
  - December 10, 2025 - Webcast - #W80901
- Producer: Mark Hugh PLLC

## **Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning)**

- June 18, 2025 - Webcast - #W80777
- Producer: The Knowledge Institute

## **2025 AICPA Regulatory Ethics Update (2 hours - afternoon)\***

- June 26, 2025 - Webcast - #W80799
- Producer: Galasso Learning Solutions LLC

\*Note: This is a two-hour ethics course. Another two-hour ethics course, in addition to this one, is needed to satisfy the biennial four-hour ethics requirement.

## OSCPA-Select™ 2025-26 CPE Calendar

OSCPA-Select™ curriculum is curated for you, to save you time. We carefully select seminars from nationally-known speakers and producers known for their expertise. Register for OSCP-Select™ and know that you're in good hands.

Want to see them organized by field of study? See page 23.

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>May 2025</b>				
May 02	Construction Industry Conference - Portland - #11220	Portland	\$315	\$390
May 02	Construction Industry Conference - Webcast - #W80711	Online	\$315	\$390
May 08	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80734	Online	\$185	\$235
May 12-15	AHI Semi-Senior Staff Training - Level II (4 days) - Webcast - #W80735	Online	\$699	\$849
May 12	Going to Tax Court in Oregon: Representing Your Client as a CPA in the Magistrate Division (1 hour - afternoon) - Webcast - #W80736	Online	\$0	\$20
May 13	ERISA Conference - Beaverton - #11221	Beaverton	\$315	\$390
May 13	ERISA Conference - Webcast - #W80712	Online	\$315	\$390
May 14	The Bottom Line on the New Lease Accounting Requirement (4 hours - morning) - Webcast - #W80737	Online	\$195	\$245
May 15	CFO Series: Minding the GAAP - NEW! - Webcast - #W80738 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
May 15	International Tax for Small and Midsized Businesses: A Practitioner's Guide to Issue Spotting (1 hour - late morning) - Webcast - #W80945	Online	\$49	\$69
May 16	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses (4 hours - morning) - Webcast - #W80739	Online	\$195	\$245
May 19-22	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80742	Online	\$699	\$849
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11234	Beaverton	\$185	\$235
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80741	Online	\$185	\$235
May 19	CFO Series: Enhancing Productivity - NEW! - Webcast - #W80740 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
May 20-21	Governmental Accounting & Auditing Conference (2 days) - Eugene - #11222	Eugene	\$439	\$539
May 20-21	Governmental Accounting & Auditing Conference (2 days) - Webcast - #W80713	Online	\$439	\$539
May 28	2025 Oregon Ethics Update (4 hours - morning) - Webcast Replay - #W80744	Online	\$185	\$235
May 28	2025 Accounting & Auditing Update for Small Businesses (4 hours - afternoon) - NEW! - Webcast Replay - #W80743	Online	\$195	\$245
May 29	Key Tax Issues Facing Business & Industry (4 hours - morning) - Webcast - #W80748	Online	\$195	\$245
May 29	Up-to-the-minute Update on Self-Employment Tax for Partners in Partnerships (2 hours - late morning) - Webcast - #W80747	Online	\$105	\$120
May 29	Common Deficiencies in SSARS Engagements (4 hours - afternoon) - Webcast Replay - #W80746	Online	\$195	\$245
May 30	Farming, Ranching & Agribusiness Conference - Webcast - #W80714	Online	\$315	\$390
May 30	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update - Webcast - #W80749	Online	\$315	\$390
<b>June 2025</b>				
Jun 02	S Corporation Taxation: Cutting Edge Tax Strategies - Webcast - #W80750	Online	\$315	\$390
Jun 03	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80751	Online	\$315	\$390
Jun 03	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80752	Online	\$185	\$235
Jun 04	Common Yellow Book & Single Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80753	Online	\$195	\$245

Date	Course Title	Location	Member Fee	Nonmember Fee
Jun 04	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80754	Online	\$179	\$229
Jun 05	Real Estate Conference - Beaverton - #11223	Beaverton	\$315	\$390
Jun 05	Real Estate Conference - Webcast - #W80715	Online	\$315	\$390
Jun 05	Addressing Common Documentation Deficiencies (2 hours - late morning) - Webcast Replay - #W80755	Online	\$95	\$110
Jun 06	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Webcast - #W80757	Online	\$315	\$390
Jun 06	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80756	Online	\$195	\$245
Jun 06	2025 Mid-Year Tax Update (4 hours - afternoon) - Webcast - #W80758	Online	\$195	\$245
Jun 09	This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas - Webcast - #W80760	Online	\$315	\$390
Jun 09	What's Changing in A&A for Governmental Entities (4 hours - morning) - NEW! - Webcast Replay - #W80759	Online	\$195	\$245
Jun 10-13	AICPA Tax School 2025 - Level 1 (4 days) - Webcast - #W80764	Online	\$1,240	\$1,390
Jun 10	CFO Series: Doing the Right Things Right - 7 Tech & 1 [NT] - NEW! - Webcast - #W80761 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 10	Financial Planning Concepts and Techniques: Beyond the Basics (4 hours - morning) - Webcast - #W80763	Online	\$185	\$210
Jun 10	Understanding the Form 990 and its Preparation Prerequisites (2 hours - late morning) - Webcast - #W80940	Online	\$99	\$129
Jun 10	IRS Tax Examinations and Hot Issues (4 hours - afternoon) - Webcast - #W80762	Online	\$195	\$245
Jun 11	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80767	Online	\$185	\$235
Jun 11	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80766	Online	\$195	\$245
Jun 11	Interpreting the FASB Recognition Standard: What All CPAs Need to Know (4 hours - afternoon) - Webcast - #W80765	Online	\$195	\$245
Jun 12-13	Technology Conference with K2 Enterprises (2 days) - Webcast - #W80716	Online	\$599	\$699
Jun 12	Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis - Webcast - #W80768	Online	\$315	\$390
Jun 13	Internal Control Fundamentals (2 hours - morning) - Webcast Replay - #W80769	Online	\$95	\$110
Jun 13	Pat Garverick's Passive Activities & Rental Real Estate Income Tax Issues - Webcast - #W80770	Online	\$315	\$390
Jun 16	CFO Series: Preparing for Trouble - 7 Tech & 1 [NT] - NEW! - Webcast - #W80771 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 16	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80772	Online	\$315	\$390
Jun 17	Accounting & Auditing Conference - Beaverton - #11224	Beaverton	\$315	\$390
Jun 17	Accounting & Auditing Conference - Webcast - #W80717	Online	\$315	\$390
Jun 17	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - Webcast - #W80773	Online	\$315	\$390
Jun 17	Succession Planning for the Small Business Owner: Finding the Exit Ramp (4 hours - morning) - Webcast - #W80774	Online	\$195	\$245
Jun 18	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80775	Online	\$315	\$390
Jun 18	K2's Excel PivotTables for Accountants - Webcast - #W80778	Online	\$315	\$390
Jun 18	Social Security and Medicare: Planning for You and Your Clients - Webcast - #W80779	Online	\$315	\$390
Jun 18	Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning) - Webcast - #W80777	Online	\$185	\$235
Jun 18	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80776	Online	\$69	\$99
Jun 19	K2's Excel Best Practices - Webcast - #W80781	Online	\$315	\$390
Jun 19	Buying and Selling a Business: Critical Tax and Structuring Issues - Webcast - #W80782	Online	\$315	\$390

Date	Course Title	Location	Member Fee	Nonmember Fee
Jun 19	Deep Dive into Common Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80780	Online	\$195	\$245
Jun 20	Estate & Trust Conference - Portland - #11225	Portland	\$315	\$390
Jun 20	Estate & Trust Conference - Webcast - #W80718	Online	\$315	\$390
Jun 20	CFD Series: Leading and Reporting - 2 Tech & 6 [NT] - NEW! - Webcast - #W80783 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 23	K2's Next Generation Excel Reporting - Webcast - #W80784	Online	\$315	\$390
Jun 23	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80785	Online	\$185	\$235
Jun 23	Required Minimum Distributions: Compliance and Planning (4 hours - morning) - Webcast - #W80786	Online	\$195	\$245
Jun 23	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Beaverton - #11235	Beaverton	\$195	\$245
Jun 23	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Webcast - #W80787	Online	\$195	\$245
Jun 24	Forest Products Conference - Webcast - #W80719	Online	\$315	\$390
Jun 24	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Beaverton - #11236	Beaverton	\$195	\$245
Jun 24	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Webcast - #W80792	Online	\$195	\$245
Jun 24	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - NEW! - Webcast - #W80790	Online	\$195	\$245
Jun 24	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80791	Online	\$195	\$245
Jun 24	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80788	Online	\$69	\$99
Jun 24	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80789	Online	\$69	\$99
Jun 25	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Beaverton - #11237	Beaverton	\$320	\$395
Jun 25	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Webcast - #W80795	Online	\$320	\$395
Jun 25	SALT Mastery Series: Oregon's Pass-Through Entity Elective Tax (PTE-E) (2 hours - afternoon) - Webcast - #W80797	Online	\$69	\$99
Jun 25	K2's Quickbooks for Accountants - Webcast - #W80796	Online	\$315	\$390
Jun 25	Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (4 hours - morning) - Webcast - #W80793	Online	\$185	\$210
Jun 25	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80794	Online	\$69	\$99
Jun 26	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Beaverton - #11238	Beaverton	\$320	\$395
Jun 26	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Webcast - #W80800	Online	\$320	\$395
Jun 26	Planning and Compliance for Complex Transactions of Business Taxpayers (4 hours - morning) - Webcast - #W80802	Online	\$195	\$245
Jun 26	K2's Data Analytics For Accountants And Auditors (4 hours - morning) - Webcast - #W80801	Online	\$195	\$245
Jun 26	K2's Mastering Advanced Excel Functions (4 hours - late morning) - Webcast - #W80798	Online	\$195	\$245
Jun 26	Understanding the "Most Common" Form 990 Schedules: A, B & O (2.5 hours - late morning) - Webcast - #W80941	Online	\$125	\$155
Jun 26	2025 AICPA Regulatory Ethics Update (2 hours - afternoon) - Webcast - #W80799	Online	\$89	\$119
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Beaverton - #11239	Beaverton	\$320	\$395
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Webcast - #W80803	Online	\$320	\$395
Jun 27	K2's Technology For CPAs - Don't Get Left Behind [NT] - Webcast - #W80804	Online	\$315	\$390
<b>July 2025</b>				
Jul 14-17	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80805	Online	\$699	\$849

Date	Course Title	Location	Member Fee	Nonmember Fee
Jul 15	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80806	Online	\$315	\$390
Jul 16	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - Webcast - #W80807	Online	\$315	\$390
Jul 17	K2's Excel Charting and Visualizations (4 hours - morning) - Webcast - #W80808	Online	\$195	\$245
Jul 17	K2's Best Word, Outlook, and PowerPoint Features (4 hours - late morning) [NT] - Webcast - #W80809	Online	\$195	\$245
Jul 21	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80810	Online	\$100	\$120
Jul 23	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80811	Online	\$69	\$99
Jul 24	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80818	Online	\$69	\$99
Jul 29	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80815	Online	\$195	\$245
Jul 29	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - late morning) - Webcast - #W80814	Online	\$195	\$245
Jul 29	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80812	Online	\$69	\$99
Jul 29	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80813	Online	\$69	\$99
Jul 30	SALT Mastery Series: OR Corporate Activity Tax: Form & Substance Matter! Includes Agency Relationship Audit Update (2 hours - afternoon) - NEW! - Webcast - #W80819	Online	\$69	\$99
Jul 30	K2's Advanced Quickbooks Tips and Techniques (4 hours - morning) - Webcast - #W80816	Online	\$195	\$245
Jul 30	K2's Case Studies in Fraud and Technology Controls (4 hours - late morning) - Webcast - #W80817	Online	\$195	\$245
<b>August 2025</b>				
Aug 18	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80820	Online	\$100	\$120
Aug 19	K2's Excel Essentials for Staff Accountants - Webcast - #W80821	Online	\$315	\$390
Aug 19	How AI Fits into the Accounting World (2 hours - late morning) - Webcast - #W80822	Online	\$105	\$120
Aug 20	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80824	Online	\$315	\$390
Aug 21	K2's QuickBooks for Accountants - Webcast - #W80825	Online	\$315	\$390
Aug 27	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80826	Online	\$69	\$99
Aug 28	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80823	Online	\$69	\$99
<b>September 2025</b>				
Sep 10	Forensic Accounting: Fraud Investigations - Webcast - #W80828	Online	\$270	\$320
Sep 11	Washington Sales and B&O Tax (4 hours - late morning) - Webcast - #W80829	Online	\$185	\$210
Sep 15-18	AHI Semi-Senior Staff Training - Level II (4 days) - Webcast - #W80830	Online	\$699	\$849
Sep 18	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80827	Online	\$69	\$99
Sep 18	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80837	Online	\$69	\$99
Sep 18	Understanding the Form 990 and its Preparation Prerequisites (2 hours - late morning) - Webcast - #W80942	Online	\$99	\$129
Sep 23	K2's Next Generation Excel Reporting - Webcast - #W80834	Online	\$315	\$390
Sep 23	Annual Update for CFOs, Controllers, and Finance Managers: Driving Business Value (4 hours - morning) - NEW! - Webcast - #W80833	Online	\$185	\$210
Sep 23	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80831	Online	\$69	\$99
Sep 23	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80832	Online	\$69	\$99
Sep 24	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80838	Online	\$315	\$390
Sep 24	SALT Mastery Series: Protecting Yourself & Your Clients: Understanding the Implications of Remote Work & Licensing Requirements (2 hours - morning) - Webcast - #W80839	Online	\$69	\$99
Sep 24	K2's Mastering Advanced Excel Functions (4 hours - morning) - Webcast - #W80835	Online	\$195	\$245
Sep 24	K2's Implementing Internal Controls In QuickBooks Environments (4 hours - late morning) - Webcast - #W80836	Online	\$195	\$245
Sep 25	Advanced Topics in a Single Audit - Webcast - #W80840	Online	\$315	\$390

Date	Course Title	Location	Member Fee	Nonmember Fee
Sep 25	K2's Improving Productivity with Microsoft 365/Office 365 Cloud Applications (4 hours - morning) [NT] - Webcast - #W80841	Online	\$195	\$245
Sep 25	K2's Working Remotely - The New Normal (4 hours - late morning) [NT] - Webcast - #W80842	Online	\$195	\$245
Sep 25	Understanding the "Most Common" Form 990 Schedules: A, B & O (2.5 hours - late morning) - Webcast - #W80943	Online	\$125	\$155
<b>October 2025</b>				
Oct 07	Interpreting the FASB Recognition Standard: What All CPAs Need to Know (4 hours - morning) - Webcast - #W80843	Online	\$185	\$235
Oct 08	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80860	Online	\$69	\$99
Oct 09	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80844	Online	\$69	\$99
Oct 16	Business & Industry Conference - Beaverton - #11226	Beaverton	\$315	\$390
Oct 16	Business & Industry Conference - Webcast - #W80723	Online	\$315	\$390
Oct 17	Top Business Tax Planning Strategies (2 hours - late morning) - Webcast - #W80845	Online	\$105	\$120
Oct 20-23	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80846	Online	\$699	\$849
Oct 21	Year-End Tax Planning: Thinking Outside the Box (4 hours - morning) - Webcast - #W80847	Online	\$195	\$245
Oct 22	SALT Mastery Series: Income Tax Nexus and Apportionment (2 hours - morning) - Webcast - #W80848	Online	\$69	\$99
Oct 23	AHI Management and Leadership Essentials - Level IV [NT] - Webcast - #W80849	Online	\$315	\$390
Oct 24	AI Revolution: The Big Picture (2 hours - morning) - Webcast - #W80934	Online	\$89	\$119
Oct 27-30	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80851	Online	\$699	\$849
Oct 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80850	Online	\$185	\$235
Oct 28	K2's Ethics and Technology (4 hours - morning) [NT] - Webcast - #W80854	Online	\$195	\$245
Oct 28	Monthly Tax Update with Ed Zollars (2 hours - morning) - Webcast - #W80855	Online	\$100	\$120
Oct 28	K2's Top PDF Features You Should Know (4 hours - late morning) [NT] - Webcast - #W80856	Online	\$195	\$245
Oct 28	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80852	Online	\$69	\$99
Oct 28	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80853	Online	\$69	\$99
Oct 29	Estate Planning for 2025 & Beyond: Oregon & Washington Issues- Beaverton - #11240	Beaverton	\$315	\$390
Oct 29	Estate Planning for 2025 & Beyond: Oregon & Washington Issues - Webcast - #W80859	Online	\$315	\$390
Oct 29	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - Webcast - #W80857	Online	\$195	\$245
Oct 29	K2's Technology Update (4 hours - late morning) - Webcast - #W80861	Online	\$195	\$245
Oct 29	Small Business Retirement Plans: Picking the Right Plan for Your Client (2 hours - late morning) - Webcast - #W80858	Online	\$105	\$120
Oct 30	The Complete Guide to Oregon Death Taxation - Beaverton - #11241	Beaverton	\$315	\$390
Oct 30	The Complete Guide to Oregon Death Taxation - Webcast - #W80863	Online	\$315	\$390
Oct 30	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80862	Online	\$195	\$245
Oct 30	K2's Securing Your Data: Practical Tools For Protecting Information (4 hours - late morning) - Webcast - #W80864	Online	\$195	\$245
Oct 31	IRS/Practitioners Forum - Portland - #11227 *Early Registration Fee (Register by 10/17/25 = \$135)	Portland	*\$150	*\$150
Oct 31	IRS/Practitioners Forum - Webcast - #W80724 *Early Registration Fee (Register by 10/17/25 = \$110)	Online	*\$125	*\$125
Oct 31	The Complete Guide to Washington Death Taxation - Beaverton - #11242	Beaverton	\$315	\$390
Oct 31	The Complete Guide to Washington Death Taxation - Webcast - #W80866	Online	\$315	\$390
Oct 31	CAS - Advancing Your Role as a Business Leader [NT] (2 hours - late morning) - Webcast - #W80865	Online	\$100	\$120

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>November 2025</b>				
Nov 03	Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships - Webcast - #W80868	Online	\$280	\$330
Nov 03	Crucial Real Estate Taxation Insights Part 1 (2 hours - late morning) - Webcast - #W80867	Online	\$105	\$120
Nov 04	Crucial Real Estate Taxation Insights Part 2 (2 hours - late morning) - Webcast - #W80869	Online	\$105	\$120
Nov 05	Crucial Real Estate Taxation Insights Part 3 (2 hours - late morning) - Webcast - #W80870	Online	\$105	\$120
Nov 06	Crucial Real Estate Taxation Insights Part 4 (2 hours - late morning) - Webcast - #W80871	Online	\$105	\$120
Nov 07	K2's Artificial Intelligence Conference - Moving Beyond The Basics - Webcast - #W80872	Online	\$315	\$390
Nov 07	CAS - Preparing for a New Fractional CFO Role: What to Do? (2 hours - late morning) - Webcast - #W80873	Online	\$100	\$120
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11243	Beaverton	\$185	\$235
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80875	Online	\$185	\$235
Nov 10	Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms - Webcast - #W80874	Online	\$280	\$330
Nov 11	Defining Where and Why Internal Controls are Needed (2 hours - late morning) - Webcast - #W80876	Online	\$105	\$120
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Beaverton - #11229	Beaverton	\$535	\$635
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Webcast - #W80726	Online	\$535	\$635
Nov 14	2025 Governmental Auditing Update: Yellow Book & Uniform Guidance (3 hours - morning) - Webcast Replay - #W80879	Online	\$105	\$145
Nov 14	CAS - Ready to be an Effective CFO? Skills to Succeed [NT] (2 hours - late morning) - Webcast - #W80878	Online	\$100	\$120
Nov 17	Guide and Update to Compilations, Reviews, and Preparations (4 hours - morning) - Webcast - #W80880	Online	\$185	\$210
Nov 18	Retirement & Financial Planning Conference - Beaverton - #11228	Beaverton	\$315	\$390
Nov 18	Retirement & Financial Planning Conference - Webcast - #W80725	Online	\$315	\$390
Nov 18	K2's Excel Best Practices - Webcast - #W80881	Online	\$315	\$390
Nov 18	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80877	Online	\$69	\$99
Nov 19	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80883	Online	\$315	\$390
Nov 19	Postmortem Estate Planning: Navigating Decedent's Estate Issues - Webcast - #W80885	Online	\$280	\$330
Nov 19	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80884	Online	\$185	\$235
Nov 19	SALT Mastery Series: Federal & State Audit Defense: Do they Really Need All Those Documents? (2 hours - afternoon) - NEW! - Webcast - #W80886	Online	\$69	\$99
Nov 19	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80882	Online	\$69	\$99
Nov 20	K2's Advanced Excel - Webcast - #W80887	Online	\$315	\$390
Nov 20	Annual Update for Accountants and Auditors with Audit Technology Hot Topics - Webcast Replay - #W80888	Online	\$315	\$390
Nov 21	Generative AI in Practice: Boost Efficiency and Profitability (2 hours - morning) - Webcast - #W80935	Online	\$89	\$119
Nov 24	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80889	Online	\$100	\$120
<b>December 2025</b>				
Dec 03	K2's Excel Conference - Webcast - #W80891	Online	\$315	\$390
Dec 03	Depreciation Rules for Bonus and Section 179 Expensing (2 hours - late morning) - Webcast - #W80890	Online	\$105	\$120
Dec 04	Reviewing Individual Tax Returns: What Are You Missing? (4 hours - morning) - Webcast - #W80892	Online	\$185	\$210

Date	Course Title	Location	Member Fee	Nonmember Fee
Dec 04	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80893	Online	\$185	\$235
Dec 05	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area (4 hours - morning) - Webcast - #W80894	Online	\$195	\$245
Dec 05	Mastering Microsoft Copilot for CPAs (2 hours - morning) [NT] - Webcast - #W80936	Online	\$89	\$119
Dec 08	Multistate Income Tax - Tax Staff Essentials - Webcast - #W80895	Online	\$270	\$320
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Beaverton - #11230	Beaverton	\$0	\$120
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Webcast - #W80727	Online	\$0	\$120
Dec 09	K2's Excel Essentials for Staff Accountants - Webcast - #W80896	Online	\$315	\$390
Dec 10	K2's Technology for CPAs - Don't Get Left Behind [NT] - Webcast - #W80900	Online	\$315	\$390
Dec 10	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80901	Online	\$185	\$235
Dec 10	SALT Mastery Series: Oregon Pass-Through Entity Elective Tax (PTE-E): Don't Miss a Deduction (2 hours - afternoon) - Webcast - #W80899	Online	\$69	\$99
Dec 10	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80898	Online	\$185	\$235
Dec 11	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Beaverton - #11244	Beaverton	\$315	\$390
Dec 11	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Webcast - #W80902	Online	\$315	\$390
Dec 12	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Beaverton - #11245	Beaverton	\$315	\$390
Dec 12	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Webcast - #W80903	Online	\$315	\$390
Dec 15	Tax Planning for Small Businesses - Tax Staff Essentials (4 hours - morning) - Webcast - #W80904	Online	\$195	\$245
Dec 16	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80907	Online	\$315	\$390
Dec 16	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80905	Online	\$69	\$99
Dec 16	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80906	Online	\$69	\$99
Dec 17	K2's Next Generation Excel Reporting - Webcast - #W80909	Online	\$315	\$390
Dec 17	SALT Mastery Series: Washington B&O and Sales Tax Including Focus on Investment Income (2 hours - morning) - NEW! - Webcast - #W80910	Online	\$69	\$99
Dec 18	K2's Accountant's Guide to QuickBooks Online - Webcast - #W80911	Online	\$315	\$390
Dec 19	Ethical AI Practices for CPAs: Ensuring Responsible Use (2 hours - morning) [NT] - Webcast - #W80937	Online	\$89	\$119
Dec 19	IRAs: What You Need to Know about Contributions, Conversions and Distributions (2 hours - late morning) - Webcast - #W80912	Online	\$105	\$120
Dec 19	What Tax Practitioners Need to Know About Medicare (2 hours - late morning) - Webcast - #W80913	Online	\$105	\$120
Dec 22	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80914	Online	\$100	\$120
Dec 29	K2's Excel Pivot Tables For Accountants - Webcast - #W80915	Online	\$315	\$390
Dec 30	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - morning) - Webcast - #W80916	Online	\$195	\$245
Dec 30	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80917	Online	\$195	\$245
<b>January 2026</b>				
Jan 05-08	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80918	Online	\$699	\$849
Jan 06	State & Local Tax Conference - Portland - #11231	Portland	\$315	\$390
Jan 06	State & Local Tax Conference - Webcast - #W80728	Online	\$315	\$390
Jan 07	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80919	Online	\$69	\$99
Jan 08	Forms 1120S and 1065 Return Review Boot Camp for New and Experienced Reviewers - Webcast - #W80920	Online	\$315	\$390

Date	Course Title	Location	Member Fee	Nonmember Fee
Jan 09	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80921	Online	\$179	\$229
Jan 13	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80924	Online	\$315	\$390
Jan 13	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80922	Online	\$69	\$99
Jan 13	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80923	Online	\$69	\$99
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Portland - #11232	Portland	\$320	\$395
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80730	Online	\$320	\$395
Jan 14	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80925	Online	\$69	\$99
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Eugene - #11233	Eugene	\$320	\$395
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80731	Online	\$320	\$395
Jan 19-20	Pat Garverick's Hands-On Tax Return Workshop: Individuals (Form 1040) (2 days) - Webcast - #W80926	Online	\$535	\$635
Jan 23	SALT Mastery Series: Multnomah County / City of Portland Taxation Update (2 hours - morning) - Webcast - #W80928	Online	\$69	\$99
Jan 23	SALT Mastery Series: City of Portland, Multnomah County, and Metro Taxes: Practitioner Perspectives (2 hours - late morning) - Webcast - #W80929	Online	\$69	\$99
Jan 23	SALT Mastery Series: Oregon Department of Revenue Update (2 hours - afternoon) - Webcast - #W80927	Online	\$69	\$99
Jan 26	Winter Governmental Auditing & Accounting Conference - Webcast - #W80729	Online	\$315	\$390
Jan 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80930	Online	\$185	\$235
Jan 29	Pat Garverick's Hands-On Tax Return Workshop: S Corporations (Form 1120S) - Webcast - #W80931	Online	\$315	\$390
Jan 30	Pat Garverick's Hands-On Tax Return Workshop: Partnership & LLCs (Form 1065) - Webcast - #W80932	Online	\$315	\$390
<b>March 2026</b>				
Mar 13	Bankruptcy Basics: Understanding the Reorganization and Liquidation Process in These Uncertain Economic Times (2 hours - morning) - Webcast - #W80933	Online	\$105	\$120

**To register, click on the course title above or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.**

# Speaker Spotlight:

## Pat Garverick, The Tax U



Haven't had a chance to take a Pat Garverick course yet? You're in for an enjoyable, knowledge-packed time. Proud alum of The Ohio State University where he earned his letter on the Ohio State basketball squad, Pat began his own tax and financial planning business after getting his Master of Taxation from Arizona State University. In addition to being a CPA, Pat is also a Certified Financial Planner (CFP). Pat has won awards for both instruction and content creation. Don't miss this opportunity to take one of Pat's courses.

### **Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis**

- June 12, 2025 - Webcast - #W80768

### **Pat Garverick's Passive Activities & Rental Real Estate Income Tax Issues**

- June 13, 2025 - Webcast - #W80770

### **Pat Garverick's Federal Tax Update: Individuals (Form 1040) - In-person, Beaverton**

- December 11, 2025 - #11244

### **Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Webcast**

- December 11, 2025 - Webcast - #W80902

### **Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - In-person, Beaverton**

- December 12, 2025 - #11245

### **Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Webcast**

- December 12, 2025 - Webcast - #W80903

### **Pat Garverick's Hands-On Tax Return Workshop: Individuals (Form 1040) (2 days) - Webcast**

- January 19-20, 2026 - Webcast - #W80926

### **Pat Garverick's Hands-On Tax Return Workshop: S Corporations (Form 1120S) - Webcast**

- January 29, 2026 - Webcast - #W80931

### **Pat Garverick's Hands-On Tax Return Workshop: Partnership & LLCs (Form 1065) - Webcast**

- January 30, 2026 - Webcast - #W80932



**To Register:** Scan the QR code or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.

# OSCPA-Select™ 2025-26 CPE Calendar by Field of Study

Zero in on the fields of study you need with this convenient calendar sorted by curriculum.

Date	Course Title	Location	Member Fee	
<b>ACCOUNTING &amp; AUDITING</b>				
<b>CONFERENCES / MINI-SERIES</b>				
May 13	ERISA Conference - Beaverton - #11221	Beaverton	\$315	\$390
May 13	ERISA Conference - Webcast - #W80712	Online	\$315	\$390
Jun 17	Accounting & Auditing Conference - Beaverton - #11224	Beaverton	\$315	\$390
Jun 17	Accounting & Auditing Conference - Webcast - #W80717	Online	\$315	\$390
<b>PROFESSIONAL TRAINING</b>				
May 12-15	AHI Semi-Senior Staff Training - Level II (4 days) - Webcast - #W80735	Online	\$699	\$849
May 19-22	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80742	Online	\$699	\$849
Jun 24	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80788	Online	\$69	\$99
Jul 14-17	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80805	Online	\$699	\$849
Jul 29	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80812	Online	\$69	\$99
Sep 15-18	AHI Semi-Senior Staff Training - Level II (4 days) - Webcast - #W80830	Online	\$699	\$849
Sep 23	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80831	Online	\$69	\$99
Oct 20-23	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80846	Online	\$699	\$849
Oct 27-30	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80851	Online	\$699	\$849
Oct 28	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80852	Online	\$69	\$99
Dec 16	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80905	Online	\$69	\$99
Jan 05-08	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80918	Online	\$699	\$849
Jan 13	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80922	Online	\$69	\$99
<b>ACCOUNTING</b>				
May 14	The Bottom Line on the New Lease Accounting Requirement (4 hours - morning) - Webcast - #W80737	Online	\$195	\$245
May 15	CFO Series: Minding the GAAP - NEW! - Webcast - #W80738 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
May 16	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses (4 hours - morning) - Webcast - #W80739	Online	\$195	\$245
May 28	2025 Accounting & Auditing Update for Small Businesses (4 hours - afternoon) - NEW! - Webcast Replay - #W80743	Online	\$195	\$245
Jun 11	Interpreting the FASB Recognition Standard: What All CPAs Need to Know (4 hours - afternoon) - Webcast - #W80765	Online	\$195	\$245
Jun 17	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - Webcast - #W80773	Online	\$315	\$390
Jun 24	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80789	Online	\$69	\$99
Jun 25	Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (4 hours - morning) - Webcast - #W80793	Online	\$185	\$210
Jul 29	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80813	Online	\$69	\$99
Aug 19	How AI Fits into the Accounting World (2 hours - late morning) - Webcast - #W80822	Online	\$105	\$120
Sep 18	Forensic Accounting: Fraud Investigations - Webcast - #W80828	Online	\$270	\$320
Sep 23	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80832	Online	\$69	\$99
Sep 23	K2's Next Generation Excel Reporting - Webcast - #W80834	Online	\$315	\$390
Oct 07	Interpreting the FASB Recognition Standard: What All CPAs Need to Know (4 hours - morning) - Webcast - #W80843	Online	\$185	\$235

Date	Course Title	Location	Member Fee	Nonmember Fee
Oct 28	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80853	Online	\$69	\$99
Nov 07	CAS - Preparing for a New Fractional CFO Role: What to Do? (2 hours - late morning) - Webcast - #W80873	Online	\$100	\$120
Nov 11	Defining Where and Why Internal Controls are Needed (2 hours - late morning) - Webcast - #W80876	Online	\$105	\$120
Nov 20	Annual Update for Accountants and Auditors with Audit Technology Hot Topics - Webcast Replay - #W80888	Online	\$315	\$390
Dec 16	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80906	Online	\$69	\$99
Dec 17	K2's Next Generation Excel Reporting - Webcast - #W80909	Online	\$315	\$390
Jan 13	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80923	Online	\$69	\$99
<b>AUDITING</b>				
May 29	Common Deficiencies in SSARS Engagements (4 hours - afternoon) - Webcast Replay - #W80746	Online	\$195	\$245
Jun 05	Addressing Common Documentation Deficiencies (2 hours - late morning) - Webcast Replay - #W80755	Online	\$95	\$110
Jun 10	CFO Series: Doing the Right Things Right - 7 Tech & 1 [NT] - NEW! - Webcast - #W80761 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 13	Internal Control Fundamentals (2 hours - morning) - Webcast Replay - #W80769	Online	\$95	\$110
Jun 16	CFO Series: Preparing for Trouble - 7 Tech & 1 [NT] - NEW! - Webcast - #W80771 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 19	Deep Dive into Common Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80780	Online	\$195	\$245
Jun 26	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Webcast - #W80800	Online	\$320	\$395
Jun 26	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Beaverton - #11238	Beaverton	\$320	\$395
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Webcast - #W80803	Online	\$320	\$395
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Beaverton - #11239	Beaverton	\$320	\$395
Jul 16	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - Webcast - #W80807	Online	\$315	\$390
Jul 30	K2's Case Studies in Fraud and Technology Controls (4 hours - late morning) - Webcast - #W80817	Online	\$195	\$245
Sep 24	K2's Implementing Internal Controls In QuickBooks Environments (4 hours - late morning) - Webcast - #W80836	Online	\$195	\$245
Nov 17	Guide and Update to Compilations, Reviews, and Preparations (4 hours - morning) - Webcast - #W80880	Online	\$185	\$210
<b>COMPILATION &amp; REVIEW</b>				
May 30	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update - Webcast - #W80749	Online	\$315	\$390
Jun 25	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Beaverton - #11237	Beaverton	\$320	\$395
Jun 25	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Webcast - #W80795	Online	\$320	\$395
<b>TAXATION</b>				
<b>CONFERENCES / MINI-SERIES</b>				
May 30	Farming, Ranching & Agribusiness Conference - Webcast - #W80714	Online	\$315	\$390
Jun 20	Estate & Trust Conference - Portland - #11225	Portland	\$315	\$390
Jun 20	Estate & Trust Conference - Webcast - #W80718	Online	\$315	\$390

Date	Course Title	Location	Member Fee	Nonmember Fee
Oct 31	IRS/Practitioners Forum - Portland - #11227 *Early Registration Fee (Register by 10/17/25 = \$135)	Portland	*\$150	*\$150
Oct 31	IRS/Practitioners Forum - Webcast - #W80724 *Early Registration Fee (Register by 10/17/25 = \$110)	Online	*\$125	*\$125
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Webcast - #W80726	Online	\$535	\$635
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Beaverton - #11229	Beaverton	\$535	\$635
Nov 18	Retirement & Financial Planning Conference - Beaverton - #11228	Beaverton	\$315	\$390
Nov 18	Retirement & Financial Planning Conference - Webcast - #W80725	Online	\$315	\$390
Jan 06	State & Local Tax Conference - Webcast - #W80728	Online	\$315	\$390
Jan 06	State & Local Tax Conference - Portland - #11231	Portland	\$315	\$390
<b>PROFESSIONAL TAX TRAINING</b>				
May 12	Going to Tax Court in Oregon: Representing Your Client as a CPA in the Magistrate Division (1 hour - afternoon) - Webcast - #W80736	Online	\$0	\$20
Jun 10-13	AICPA Tax School 2025 - Level 1 (4 days) - Webcast - #W80764	Online	\$1,240	\$1,390
Jun 10	Understanding the Form 990 and its Preparation Prerequisites (2 hours - late morning) - Webcast - #W80940	Online	\$99	\$129
Jun 12	Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis - Webcast - #W80768	Online	\$315	\$390
Jun 13	Pat Garverick's Passive Activities & Rental Real Estate Income Tax Issues - Webcast - #W80770	Online	\$315	\$390
Jun 23	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Webcast - #W80787	Online	\$195	\$245
Jun 23	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Beaverton - #11235	Beaverton	\$195	\$245
Jun 24	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Beaverton - #11236	Beaverton	\$195	\$245
Jun 24	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Webcast - #W80792	Online	\$195	\$245
Jun 25	SALT Mastery Series: Oregon's Pass-Through Entity Elective Tax (PTE-E) (2 hours - afternoon) - Webcast - #W80797	Online	\$69	\$99
Jun 26	Understanding the "Most Common" Form 990 Schedules: A, B & O (2.5 hours - late morning) - Webcast - #W80941	Online	\$125	\$155
Jul 30	SALT Mastery Series: OR Corporate Activity Tax: Form & Substance Matter! Includes Agency Relationship Audit Update (2 hours - afternoon) - NEW! - Webcast - #W80819	Online	\$69	\$99
Sep 18	Understanding the Form 990 and its Preparation Prerequisites (2 hours - late morning) - Webcast - #W80942	Online	\$99	\$129
Sep 24	SALT Mastery Series: Protecting Yourself & Your Clients: Understanding the Implications of Remote Work & Licensing Requirements (2 hours - morning) - Webcast - #W80839	Online	\$69	\$99
Sep 25	Understanding the "Most Common" Form 990 Schedules: A, B & O (2.5 hours - late morning) - Webcast - #W80943	Online	\$125	\$155
Oct 22	SALT Mastery Series: Income Tax Nexus and Apportionment (2 hours - morning) - Webcast - #W80848	Online	\$69	\$99
Nov 19	SALT Mastery Series: Federal & State Audit Defense: Do they Really Need All Those Documents? (2 hours - afternoon) - NEW! - Webcast - #W80886	Online	\$69	\$99
Dec 10	SALT Mastery Series: Oregon Pass-Through Entity Elective Tax (PTE-E): Don't Miss a Deduction (2 hours - afternoon) - Webcast - #W80899	Online	\$69	\$99
Dec 17	SALT Mastery Series: Washington B&O and Sales Tax Including Focus on Investment Income (2 hours - morning) - NEW! - Webcast - #W80910	Online	\$69	\$99
Jan 08	Forms 1120S and 1065 Return Review Boot Camp for New and Experienced Reviewers - Webcast - #W80920	Online	\$315	\$390
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80730	Online	\$320	\$395
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Portland - #11232	Portland	\$320	\$395
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80731	Online	\$320	\$395

Date	Course Title	Location	Member Fee	Nonmember Fee
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Eugene - #11233	Eugene	\$320	\$395
Jan 23	SALT Mastery Series: Oregon Department of Revenue Update (2 hours - afternoon) - Webcast - #W80927	Online	\$69	\$99
Jan 23	SALT Mastery Series: City of Portland, Multnomah County, and Metro Taxes: Practitioner Perspectives (2 hours - late morning) - Webcast - #W80929	Online	\$69	\$99
Jan 23	SALT Mastery Series: Multnomah County / City of Portland Taxation Update (2 hours - morning) - Webcast - #W80928	Online	\$69	\$99
<b>INDIVIDUAL</b>				
Dec 04	Reviewing Individual Tax Returns: What Are You Missing? (4 hours - morning) - Webcast - #W80892	Online	\$185	\$210
Dec 11	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Beaverton - #11244	Beaverton	\$315	\$390
Dec 11	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Webcast - #W80902	Online	\$315	\$390
Jan 19-20	Pat Garverick's Hands-On Tax Return Workshop: Individuals (Form 1040) (2 days) - Webcast - #W80926	Online	\$535	\$635
<b>PARTNERSHIP/LLC/LLP/FAMILY LIMITED PARTNERSHIPS</b>				
May 29	Up-to-the-minute Update on Self-Employment Tax for Partners in Partnerships (2 hours - late morning) - Webcast - #W80747	Online	\$105	\$120
Nov 03	Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships - Webcast - #W80868	Online	\$280	\$330
Dec 12	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Webcast - #W80903	Online	\$315	\$390
Dec 12	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Beaverton - #11245	Beaverton	\$315	\$390
Jan 30	Pat Garverick's Hands-On Tax Return Workshop: Partnership & LLCs (Form 1065) - Webcast - #W80932	Online	\$315	\$390
<b>S CORPORATIONS</b>				
Jun 02	S Corporation Taxation: Cutting Edge Tax Strategies - Webcast - #W80750	Online	\$315	\$390
Jan 29	Pat Garverick's Hands-On Tax Return Workshop: S Corporations (Form 1120S) - Webcast - #W80931	Online	\$315	\$390
<b>FIDUCIARY, ESTATE &amp; GIFT TAXATION</b>				
Jun 04	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80754	Online	\$179	\$229
Jun 09	This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas - Webcast - #W80760	Online	\$315	\$390
Oct 29	Estate Planning for 2025 & Beyond: Oregon & Washington Issues- Beaverton - #11240	Beaverton	\$315	\$390
Oct 29	Estate Planning for 2025 & Beyond: Oregon & Washington Issues - Webcast - #W80859	Online	\$315	\$390
Oct 30	The Complete Guide to Oregon Death Taxation - Beaverton - #11241	Beaverton	\$315	\$390
Oct 30	The Complete Guide to Oregon Death Taxation - Webcast - #W80863	Online	\$315	\$390
Oct 31	The Complete Guide to Washington Death Taxation - Beaverton - #11242	Beaverton	\$315	\$390
Oct 31	The Complete Guide to Washington Death Taxation - Webcast - #W80866	Online	\$315	\$390
Nov 10	Fiduciary Income Tax Returns - Form 1041 Workshop with Filled-in Forms - Webcast - #W80874	Online	\$280	\$330
Nov 19	Postmortem Estate Planning: Navigating Decedent's Estate Issues - Webcast - #W80885	Online	\$280	\$330
Dec 05	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area (4 hours - morning) - Webcast - #W80894	Online	\$195	\$245
Jan 09	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80921	Online	\$179	\$229
<b>EMPLOYEE BENEFITS, PENSION &amp; PROFIT-SHARING PLANS</b>				
Jun 18	Social Security and Medicare: Planning for You and Your Clients - Webcast - #W80779	Online	\$315	\$390

Date	Course Title	Location	Member Fee	Nonmember Fee
Dec 19	What Tax Practitioners Need to Know About Medicare (2 hours - late morning) - Webcast - #W80913	Online	\$105	\$120
<b>INTERNATIONAL TAXATION</b>				
May 15	International Tax for Small and Mid-sized Businesses: A Practitioner's Guide to Issue Spotting (1 hour - late morning) - Webcast - #W80945	Online	\$49	\$69
<b>TAXATION – OTHER</b>				
May 29	Key Tax Issues Facing Business & Industry (4 hours - morning) - Webcast - #W80748	Online	\$195	\$245
Jun 06	2025 Mid-Year Tax Update (4 hours - afternoon) - Webcast - #W80758	Online	\$195	\$245
Jun 10	IRS Tax Examinations and Hot Issues (4 hours - afternoon) - Webcast - #W80762	Online	\$195	\$245
Jun 10	Financial Planning Concepts and Techniques: Beyond the Basics (4 hours - morning) - Webcast - #W80763	Online	\$185	\$210
Jun 17	Succession Planning for the Small Business Owner: Finding the Exit Ramp (4 hours - morning) - Webcast - #W80774	Online	\$195	\$245
Jun 19	Buying and Selling a Business: Critical Tax and Structuring Issues - Webcast - #W80782	Online	\$315	\$390
Jun 23	Required Minimum Distributions: Compliance and Planning (4 hours - morning) - Webcast - #W80786	Online	\$195	\$245
Jun 26	Planning and Compliance for Complex Transactions of Business Taxpayers (4 hours - morning) - Webcast - #W80802	Online	\$195	\$245
Jul 21	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80810	Online	\$100	\$120
Aug 18	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80820	Online	\$100	\$120
Sep 11	Washington Sales and B&O Tax (4 hours - late morning) - Webcast - #W80829	Online	\$185	\$210
Oct 17	Top Business Tax Planning Strategies (2 hours - late morning) - Webcast - #W80845	Online	\$105	\$120
Oct 21	Year-End Tax Planning: Thinking Outside the Box (4 hours - morning) - Webcast - #W80847	Online	\$195	\$245
Oct 28	Monthly Tax Update with Ed Zollars (2 hours - morning) - Webcast - #W80855	Online	\$100	\$120
Oct 29	Small Business Retirement Plans: Picking the Right Plan for Your Client (2 hours - late morning) - Webcast - #W80858	Online	\$105	\$120
Nov 03	Crucial Real Estate Taxation Insights Part 1 (2 hours - late morning) - Webcast - #W80867	Online	\$105	\$120
Nov 04	Crucial Real Estate Taxation Insights Part 2 (2 hours - late morning) - Webcast - #W80869	Online	\$105	\$120
Nov 05	Crucial Real Estate Taxation Insights Part 3 (2 hours - late morning) - Webcast - #W80870	Online	\$105	\$120
Nov 06	Crucial Real Estate Taxation Insights Part 4 (2 hours - late morning) - Webcast - #W80871	Online	\$105	\$120
Nov 24	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80889	Online	\$100	\$120
Dec 03	Depreciation Rules for Bonus and Section 179 Expensing (2 hours - late morning) - Webcast - #W80890	Online	\$105	\$120
Dec 08	Multistate Income Tax - Tax Staff Essentials - Webcast - #W80895	Online	\$270	\$320
Dec 15	Tax Planning for Small Businesses - Tax Staff Essentials (4 hours - morning) - Webcast - #W80904	Online	\$195	\$245
Dec 19	IRAs: What You Need to Know about Contributions, Conversions and Distributions (2 hours - late morning) - Webcast - #W80912	Online	\$105	\$120
Dec 22	Monthly Tax Update with Ed Zollars (2 hours - afternoon) - Webcast - #W80914	Online	\$100	\$120
<b>MANAGEMENT &amp; CONSULTING</b>				
<b>CONFERENCES / MINI-SERIES</b>				
Jun 05	Real Estate Conference - Webcast - #W80715	Online	\$315	\$390
Jun 05	Real Estate Conference - Beaverton - #11223	Beaverton	\$315	\$390
Jun 12-13	Technology Conference with K2 Enterprises (2 days) - Webcast - #W80716	Online	\$599	\$699
<b>BUSINESS LAW</b>				
Jun 11	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80766	Online	\$195	\$245

Date	Course Title	Location	Member Fee	Nonmember Fee
Dec 10	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80898	Online	\$185	\$235
Mar 13	Bankruptcy Basics: Understanding the Reorganization and Liquidation Process in These Uncertain Economic Times (2 hours - morning) - Webcast - #W80933	Online	\$105	\$120
<b>BUSINESS MANAGEMENT &amp; ORGANIZATION</b>				
Jun 20	CFO Series: Leading and Reporting - 2 Tech & 6 [NT] - NEW! - Webcast - #W80783 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Oct 31	CAS - Advancing Your Role as a Business Leader [NT] (2 hours - late morning) - Webcast - #W80865	Online	\$100	\$120
Nov 14	CAS - Ready to be an Effective CFO? Skills to Succeed [NT] (2 hours - late morning) - Webcast - #W80878	Online	\$100	\$120
<b>FINANCE</b>				
May 19	CFO Series: Enhancing Productivity - NEW! - Webcast - #W80740 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Sep 23	Annual Update for CFOs, Controllers, and Finance Managers: Driving Business Value (4 hours - morning) - NEW! - Webcast - #W80833	Online	\$185	\$210
<b>COMMUNICATIONS &amp; MARKETING</b>				
Jun 18	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80776	Online	\$69	\$99
Jul 23	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80811	Online	\$69	\$99
Aug 28	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80823	Online	\$69	\$99
Sep 18	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80827	Online	\$69	\$99
Oct 09	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80844	Online	\$69	\$99
Oct 23	AHI Management and Leadership Essentials - Level IV [NT] - Webcast - #W80849	Online	\$315	\$390
Nov 19	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80882	Online	\$69	\$99
Jan 07	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80919	Online	\$69	\$99
<b>COMPUTER SOFTWARE &amp; APPLICATIONS</b>				
Jun 18	K2's Excel PivotTables for Accountants - Webcast - #W80778	Online	\$315	\$390
Jun 19	K2's Excel Best Practices - Webcast - #W80781	Online	\$315	\$390
Jun 23	K2's Next Generation Excel Reporting - Webcast - #W80784	Online	\$315	\$390
Jun 24	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - NEW! - Webcast - #W80790	Online	\$195	\$245
Jun 26	K2's Mastering Advanced Excel Functions (4 hours - late morning) - Webcast - #W80798	Online	\$195	\$245
Jun 27	K2's Technology For CPAs - Don't Get Left Behind [NT] - Webcast - #W80804	Online	\$315	\$390
Jul 15	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80806	Online	\$315	\$390
Jul 17	K2's Best Word, Outlook, and PowerPoint Features (4 hours - late morning) [NT] - Webcast - #W80809	Online	\$195	\$245
Jul 17	K2's Excel Charting and Visualizations (4 hours - morning) - Webcast - #W80808	Online	\$195	\$245
Jul 30	K2's Advanced Quickbooks Tips and Techniques (4 hours - morning) - Webcast - #W80816	Online	\$195	\$245
Aug 21	K2's QuickBooks for Accountants - Webcast - #W80825	Online	\$315	\$390
Sep 25	K2's Working Remotely - The New Normal (4 hours - late morning) [NT] - Webcast - #W80842	Online	\$195	\$245

Date	Course Title	Location	Member Fee	Nonmember Fee
Sep 25	K2's Improving Productivity with Microsoft 365/Office 365 Cloud Applications (4 hours - morning) [NT] - Webcast - #W80841	Online	\$195	\$245
Oct 28	K2's Top PDF Features You Should Know (4 hours - late morning) [NT] - Webcast - #W80856	Online	\$195	\$245
Oct 29	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - Webcast - #W80857	Online	\$195	\$245
Oct 30	K2's Securing Your Data: Practical Tools For Protecting Information (4 hours - late morning) - Webcast - #W80864	Online	\$195	\$245
Oct 30	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80862	Online	\$195	\$245
Nov 18	K2's Excel Best Practices - Webcast - #W80881	Online	\$315	\$390
Nov 19	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80883	Online	\$315	\$390
Nov 20	K2's Advanced Excel - Webcast - #W80887	Online	\$315	\$390
Dec 03	K2's Excel Conference - Webcast - #W80891	Online	\$315	\$390
Dec 05	Mastering Microsoft Copilot for CPAs (2 hours - morning) [NT] - Webcast - #W80936	Online	\$89	\$119
Dec 09	K2's Excel Essentials for Staff Accountants - Webcast - #W80896	Online	\$315	\$390
Dec 10	K2's Technology for CPAs - Don't Get Left Behind [NT] - Webcast - #W80900	Online	\$315	\$390
Dec 16	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80907	Online	\$315	\$390
Dec 18	K2's Accountant's Guide to QuickBooks Online - Webcast - #W80911	Online	\$315	\$390
Dec 29	K2's Excel Pivot Tables For Accountants - Webcast - #W80915	Online	\$315	\$390
<b>INFORMATION TECHNOLOGY</b>				
Jun 25	K2's Quickbooks for Accountants - Webcast - #W80796	Online	\$315	\$390
Jun 26	K2's Data Analytics For Accountants And Auditors (4 hours - morning) - Webcast - #W80801	Online	\$195	\$245
Jul 29	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80815	Online	\$195	\$245
Jul 29	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - late morning) - Webcast - #W80814	Online	\$195	\$245
Aug 19	K2's Excel Essentials for Staff Accountants - Webcast - #W80821	Online	\$315	\$390
Aug 20	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80824	Online	\$315	\$390
Sep 24	K2's Mastering Advanced Excel Functions (4 hours - morning) - Webcast - #W80835	Online	\$195	\$245
Oct 24	AI Revolution: The Big Picture (2 hours - morning) - Webcast - #W80934	Online	\$89	\$119
Oct 29	K2's Technology Update (4 hours - late morning) - Webcast - #W80861	Online	\$195	\$245
Nov 07	K2's Artificial Intelligence Conference - Moving Beyond The Basics - Webcast - #W80872	Online	\$315	\$390
Nov 21	Generative AI in Practice: Boost Efficiency and Profitability (2 hours - morning) - Webcast - #W80935	Online	\$89	\$119
Dec 30	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - morning) - Webcast - #W80916	Online	\$195	\$245
<b>SPECIALIZED KNOWLEDGE</b>				
<b>CONFERENCES / MINI-SERIES</b>				
May 02	Construction Industry Conference - Webcast - #W80711	Online	\$315	\$390
May 02	Construction Industry Conference - Portland - #11220	Portland	\$315	\$390
Jun 24	Forest Products Conference - Webcast - #W80719	Online	\$315	\$390
Oct 16	Business & Industry Conference - Beaverton - #11226	Beaverton	\$315	\$390
Oct 16	Business & Industry Conference - Webcast - #W80723	Online	\$315	\$390
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Beaverton - #11230	Beaverton	\$0	\$120
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Webcast - #W80727	Online	\$0	\$120

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>GOVERNMENTAL</b>				
May 20-21	Governmental Accounting & Auditing Conference (2 days) - Webcast - #W80713	Online	\$439	\$539
May 20-21	Governmental Accounting & Auditing Conference (2 days) - Eugene - #11222	Eugene	\$439	\$539
Jun 04	Common Yellow Book & Single Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80753	Online	\$195	\$245
Jun 06	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Webcast - #W80757	Online	\$315	\$390
Jun 09	What's Changing in A&A for Governmental Entities (4 hours - morning) - NEW! - Webcast Replay - #W80759	Online	\$195	\$245
Jun 16	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80772	Online	\$315	\$390
Jun 18	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80775	Online	\$315	\$390
Sep 25	Advanced Topics in a Single Audit - Webcast - #W80840	Online	\$315	\$390
Nov 14	2025 Governmental Auditing Update: Yellow Book & Uniform Guidance (3 hours - morning) - Webcast Replay - #W80879	Online	\$105	\$145
Jan 13	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80924	Online	\$315	\$390
Jan 26	Winter Governmental Auditing & Accounting Conference - Webcast - #W80729	Online	\$315	\$390
<b>NOT-FOR-PROFIT</b>				
Jun 03	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80751	Online	\$315	\$390
Jun 06	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80756	Online	\$195	\$245
Sep 24	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80838	Online	\$315	\$390
<b>PROFESSIONAL CONDUCT &amp; ETHICS</b>				
May 08	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80734	Online	\$185	\$235
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11234	Beaverton	\$185	\$235
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80741	Online	\$185	\$235
May 28	2025 Oregon Ethics Update (4 hours - morning) - Webcast Replay - #W80744	Online	\$185	\$235
Jun 03	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80752	Online	\$185	\$235
Jun 11	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80767	Online	\$185	\$235
Jun 18	Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning) - Webcast - #W80777	Online	\$185	\$235
Jun 23	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80785	Online	\$185	\$235
Oct 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80850	Online	\$185	\$235
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11243	Beaverton	\$185	\$235
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80875	Online	\$185	\$235
Nov 19	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80884	Online	\$185	\$235
Dec 04	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80893	Online	\$185	\$235
Dec 10	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80901	Online	\$185	\$235
Jan 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80930	Online	\$185	\$235
<b>BEHAVIORAL ETHICS</b>				
Jun 24	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80791	Online	\$195	\$245
Oct 28	K2's Ethics and Technology (4 hours - morning) [NT] - Webcast - #W80854	Online	\$195	\$245

Date	Course Title	Location	Member Fee	Nonmember Fee
Dec 19	Ethical AI Practices for CPAs: Ensuring Responsible Use (2 hours - morning) [NT] - Webcast - #W80937	Online	\$89	\$119
Dec 30	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80917	Online	\$195	\$245
<b>REGULATORY ETHICS</b>				
Jun 26	2025 AICPA Regulatory Ethics Update (2 hours - afternoon) - Webcast - #W80799	Online	\$89	\$119
<b>PERSONAL DEVELOPMENT</b>				
Jun 25	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80794	Online	\$69	\$99
Jul 24	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80818	Online	\$69	\$99
Aug 27	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80826	Online	\$69	\$99
Sep 18	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80837	Online	\$69	\$99
Oct 08	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80860	Online	\$69	\$99
Nov 18	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80877	Online	\$69	\$99
Jan 14	The Mindful CPA (2 hours - afternoon) [NT] - NEW! - Webcast - #W80925	Online	\$69	\$99

**To register, click on the course title above or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.**



## Empower Your Team. Boost Your Bottom Line

For over 35 years, AHI Associates has been the industry leader in staff training solutions for accounting firms. They deliver live, interactive courses that are proven effective and customizable, designed specifically to help you achieve your firm's professional development and staff performance goals.

### AHI Semi-Senior Staff Training - Level II (4 days)

- May 12-15, 2025 - Webcast - #W80735
  - September 15-18, 2025 - Webcast - #W80830
- Member Fee: \$699/ Nonmember Fee \$849

### AHI Basic Staff Training - Level I (4 days)

- July 14-17, 2025 - Webcast - #W80805
  - October 20-23, 2025 - Webcast - #W80846
  - January 5-8, 2026 - Webcast - #W80918
- Member Fee: \$699 / \$849: Nonmember Fee

### AHI Management and Leadership Essentials - Level IV [NT]

- October 23, 2025 - Webcast - #W80849
- Member Fee: \$315 / Nonmember Fee \$390

### AHI Beginning In-charge Staff Training - Level III (4 days)

- May 19-22, 2025 - Webcast - #W80742
  - Oct 27-30, 2025 - Webcast - #W80851
- Member Fee: \$699/ Nonmember Fee \$849

# 2025 Federal Tax Update

featuring Greg White & George Koutelieris



Greg White



George Koutelieris

There's a reason people call them "Greg and George." These two are engaging and dynamic, with consistently top marks from attendees. They're back this year with the fast-paced, thorough, and easy-to-understand 2025 Federal Tax Update – held in two locations and online. Greg and George will share the latest insights, strategies, and solutions to navigate the ever-changing federal tax landscape. You'll gain invaluable knowledge that will help you save your clients money, reduce their tax liabilities, and ensure compliance with the latest regulations. Don't miss your chance to learn from the best!

## 2025 has seen important tax developments:

- New regulations covering:
  - Required Roth treatment for 401(k) catch-up contributions.
  - Administrative appeals to the IRS.
  - Ethical rules of practice before the IRS.
- Tax Cuts and Jobs Act extension.
- Passive activities.
- Individual retirement accounts.
- Reductions in staffing at the IRS - What's the impact on taxpayer service?

## 2025 Federal Tax Update featuring Greg White & George Koutelieris

- January 14, 2026 - In-person, Portland - #11232
- January 14, 2026 - Webcast - #W80730
- January 15, 2026 - In-person, Eugene - #11233
- January 15, 2026 - Webcast - #W80731

**Member Fee:** \$320 / **Nonmember Fee:** \$395

**CPE:** 8 / **Level:** 2 (Intermediate)

**IRS CE:** Pending Approval

**Producer:** Cutting Edge Tax Strategies LLC



**To Register:** Scan the QR code or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.

# Business & Industry Calendar

Business needs CPAs and their expertise is vital. Get the knowledge and training you need to help your organization thrive.

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>May 2025</b>				
May 08	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80734	Online	\$185	\$235
May 14	The Bottom Line on the New Lease Accounting Requirement (4 hours - morning) - Webcast - #W80737	Online	\$195	\$245
May 15	CFO Series: Minding the GAAP - NEW! - Webcast - #W80738 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
May 16	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses (4 hours - morning) - Webcast - #W80739	Online	\$195	\$245
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11234	Beaverton	\$185	\$235
May 19	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80741	Online	\$185	\$235
May 19	CFO Series: Enhancing Productivity - NEW! - Webcast - #W80740 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
May 28	2025 Oregon Ethics Update (4 hours - morning) - Webcast Replay - #W80744	Online	\$185	\$235
May 28	2025 Accounting & Auditing Update for Small Businesses (4 hours - afternoon) - NEW! - Webcast Replay - #W80743	Online	\$195	\$245
May 29	Key Tax Issues Facing Business & Industry (4 hours - morning) - Webcast - #W80748	Online	\$195	\$245
May 30	Farming, Ranching & Agribusiness Conference - Webcast - #W80714	Online	\$315	\$390
<b>June 2025</b>				
Jun 03	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80751	Online	\$315	\$390
Jun 03	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80752	Online	\$185	\$235
Jun 05	Real Estate Conference - Beaverton - #11223	Beaverton	\$315	\$390
Jun 05	Real Estate Conference - Webcast - #W80715	Online	\$315	\$390
Jun 06	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80756	Online	\$195	\$245
Jun 10	CFO Series: Doing the Right Things Right - 7 Tech & 1 [NT] - NEW! - Webcast - #W80761 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 11	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80767	Online	\$185	\$235
Jun 11	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80766	Online	\$195	\$245
Jun 12-13	Technology Conference with K2 Enterprises (2 days) - Webcast - #W80716	Online	\$599	\$699
Jun 13	Internal Control Fundamentals (2 hours - morning) - Webcast Replay - #W80769	Online	\$95	\$110
Jun 13	Pat Garverick's Passive Activities & Rental Real Estate Income Tax Issues - Webcast - #W80770	Online	\$315	\$390
Jun 16	CFO Series: Preparing for Trouble - 7 Tech & 1 [NT] - NEW! - Webcast - #W80771 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 17	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - Webcast - #W80773	Online	\$315	\$390
Jun 17	Succession Planning for the Small Business Owner: Finding the Exit Ramp (4 hours - morning) - Webcast - #W80774	Online	\$195	\$245

Date	Course Title	Location	Member Fee	Nonmember Fee
Jun 18	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80775	Online	\$315	\$390
Jun 18	K2's Excel PivotTables for Accountants - Webcast - #W80778	Online	\$315	\$390
Jun 18	Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning) - Webcast - #W80777	Online	\$185	\$235
Jun 18	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80776	Online	\$69	\$99
Jun 19	K2's Excel Best Practices - Webcast - #W80781	Online	\$315	\$390
Jun 19	Buying and Selling a Business: Critical Tax and Structuring Issues - Webcast - #W80782	Online	\$315	\$390
Jun 20	CFO Series: Leading and Reporting - 2 Tech & 6 [NT] - NEW! - Webcast - #W80783 *Register by 5/9/25 and save \$25!	Online	*\$315	*\$390
Jun 23	K2's Next Generation Excel Reporting - Webcast - #W80784	Online	\$315	\$390
Jun 23	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80785	Online	\$185	\$235
Jun 24	Forest Products Conference - Webcast - #W80719	Online	\$315	\$390
Jun 24	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - NEW! - Webcast - #W80790	Online	\$195	\$245
Jun 24	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80791	Online	\$195	\$245
Jun 24	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80788	Online	\$69	\$99
Jun 24	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80789	Online	\$69	\$99
Jun 25	K2's Quickbooks for Accountants - Webcast - #W80796	Online	\$315	\$390
Jun 25	Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (4 hours - morning) - Webcast - #W80793	Online	\$185	\$210
Jun 26	Planning and Compliance for Complex Transactions of Business Taxpayers (4 hours - morning) - Webcast - #W80802	Online	\$195	\$245
Jun 26	K2's Data Analytics For Accountants And Auditors (4 hours - morning) - Webcast - #W80801	Online	\$195	\$245
Jun 26	K2's Mastering Advanced Excel Functions (4 hours - late morning) - Webcast - #W80798	Online	\$195	\$245
Jun 26	2025 AICPA Regulatory Ethics Update (2 hours - afternoon) - Webcast - #W80799	Online	\$89	\$119
Jun 27	K2's Technology For CPAs - Don't Get Left Behind [NT] - Webcast - #W80804	Online	\$315	\$390
<b>July 2025</b>				
Jul 15	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80806	Online	\$315	\$390
Jul 16	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - Webcast - #W80807	Online	\$315	\$390
Jul 17	K2's Excel Charting and Visualizations (4 hours - morning) - Webcast - #W80808	Online	\$195	\$245
Jul 17	K2's Best Word, Outlook, and PowerPoint Features (4 hours - late morning) [NT] - Webcast - #W80809	Online	\$195	\$245
Jul 23	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80811	Online	\$69	\$99
Jul 29	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80815	Online	\$195	\$245
Jul 29	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - late morning) - Webcast - #W80814	Online	\$195	\$245
Jul 29	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80812	Online	\$69	\$99

Date	Course Title	Location	Member Fee	Nonmember Fee
Jul 29	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80813	Online	\$69	\$99
Jul 30	K2's Advanced Quickbooks Tips and Techniques (4 hours - morning) - Webcast - #W80816	Online	\$195	\$245
Jul 30	K2's Case Studies in Fraud and Technology Controls (4 hours - late morning) - Webcast - #W80817	Online	\$195	\$245
<b>August 2025</b>				
Aug 19	K2's Excel Essentials for Staff Accountants - Webcast - #W80821	Online	\$315	\$390
Aug 19	How AI Fits into the Accounting World (2 hours - late morning) - Webcast - #W80822	Online	\$105	\$120
Aug 20	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80824	Online	\$315	\$390
Aug 21	K2's QuickBooks for Accountants - Webcast - #W80825	Online	\$315	\$390
Aug 28	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80823	Online	\$69	\$99
<b>September 2025</b>				
Sep 11	Washington Sales and B&O Tax (4 hours - late morning) - Webcast - #W80829	Online	\$185	\$210
Sep 18	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80827	Online	\$69	\$99
Sep 23	K2's Next Generation Excel Reporting - Webcast - #W80834	Online	\$315	\$390
Sep 23	Annual Update for CFOs, Controllers, and Finance Managers: Driving Business Value (4 hours - morning) - NEW! - Webcast - #W80833	Online	\$185	\$210
Sep 23	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80831	Online	\$69	\$99
Sep 23	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80832	Online	\$69	\$99
Sep 24	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80838	Online	\$315	\$390
Sep 24	K2's Mastering Advanced Excel Functions (4 hours - morning) - Webcast - #W80835	Online	\$195	\$245
Sep 24	K2's Implementing Internal Controls In QuickBooks Environments (4 hours - late morning) - Webcast - #W80836	Online	\$195	\$245
Sep 25	K2's Improving Productivity with Microsoft 365/Office 365 Cloud Applications (4 hours - morning) [NT] - Webcast - #W80841	Online	\$195	\$245
Sep 25	K2's Working Remotely - The New Normal (4 hours - late morning) [NT] - Webcast - #W80842	Online	\$195	\$245
<b>October 2025</b>				
Oct 09	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80844	Online	\$69	\$99
Oct 16	Business & Industry Conference - Beaverton - #11226	Beaverton	\$315	\$390
Oct 16	Business & Industry Conference - Webcast - #W80723	Online	\$315	\$390
Oct 17	Top Business Tax Planning Strategies (2 hours - late morning) - Webcast - #W80845	Online	\$105	\$120
Oct 24	AI Revolution: The Big Picture (2 hours - morning) - Webcast - #W80934	Online	\$89	\$119
Oct 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80850	Online	\$185	\$235
Oct 28	K2's Ethics and Technology (4 hours - morning) [NT] - Webcast - #W80854	Online	\$195	\$245
Oct 28	K2's Top PDF Features You Should Know (4 hours - late morning) [NT] - Webcast - #W80856	Online	\$195	\$245

# B&I CALENDAR

Date	Course Title	Location	Member Fee	Nonmember Fee
Oct 28	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80852	Online	\$69	\$99
Oct 28	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80853	Online	\$69	\$99
Oct 29	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - Webcast - #W80857	Online	\$195	\$245
Oct 29	K2's Technology Update (4 hours - late morning) - Webcast - #W80861	Online	\$195	\$245
Oct 30	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80862	Online	\$195	\$245
Oct 30	K2's Securing Your Data: Practical Tools For Protecting Information (4 hours - late morning) - Webcast - #W80864	Online	\$195	\$245
Oct 31	CAS - Advancing Your Role as a Business Leader [NT] (2 hours - late morning) - Webcast - #W80865	Online	\$100	\$120
<b>November 2025</b>				
Nov 03	Crucial Real Estate Taxation Insights Part 1 (2 hours - late morning) - Webcast - #W80867	Online	\$105	\$120
Nov 04	Crucial Real Estate Taxation Insights Part 2 (2 hours - late morning) - Webcast - #W80869	Online	\$105	\$120
Nov 05	Crucial Real Estate Taxation Insights Part 3 (2 hours - late morning) - Webcast - #W80870	Online	\$105	\$120
Nov 06	Crucial Real Estate Taxation Insights Part 4 (2 hours - late morning) - Webcast - #W80871	Online	\$105	\$120
Nov 07	K2's Artificial Intelligence Conference - Moving Beyond The Basics - Webcast - #W80872	Online	\$315	\$390
Nov 07	CAS - Preparing for a New Fractional CFO Role: What to Do? (2 hours - late morning) - Webcast - #W80873	Online	\$100	\$120
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11243	Beaverton	\$185	\$235
Nov 10	Professional Conduct & Ethics - AICPA and Oregon Board CPA 2025 Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80875	Online	\$185	\$235
Nov 11	Defining Where and Why Internal Controls are Needed (2 hours - late morning) - Webcast - #W80876	Online	\$105	\$120
Nov 14	CAS - Ready to be an Effective CFO? Skills to Succeed [NT] (2 hours - late morning) - Webcast - #W80878	Online	\$100	\$120
Nov 18	K2's Excel Best Practices - Webcast - #W80881	Online	\$315	\$390
Nov 19	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80883	Online	\$315	\$390
Nov 19	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80884	Online	\$185	\$235
Nov 19	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80882	Online	\$69	\$99
Nov 20	K2's Advanced Excel - Webcast - #W80887	Online	\$315	\$390
Nov 20	Annual Update for Accountants and Auditors with Audit Technology Hot Topics - Webcast Replay - #W80888	Online	\$315	\$390
Nov 21	Generative AI in Practice: Boost Efficiency and Profitability (2 hours - morning) - Webcast - #W80935	Online	\$89	\$119
<b>December 2025</b>				
Dec 03	K2's Excel Conference - Webcast - #W80891	Online	\$315	\$390
Dec 04	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80893	Online	\$185	\$235
Dec 05	Mastering Microsoft Copilot for CPAs (2 hours - morning) [NT] - Webcast - #W80936	Online	\$89	\$119

Date	Course Title	Location	Member Fee	Nonmember Fee
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Beaverton - #11230	Beaverton	\$0	\$120
Dec 09	2025 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Webcast - #W80727	Online	\$0	\$120
Dec 10	K2's Technology for CPAs - Don't Get Left Behind [NT] - Webcast - #W80900	Online	\$315	\$390
Dec 10	Oregon & Washington Ethics 2025 (4 hours - morning) - Webcast - #W80901	Online	\$185	\$235
Dec 10	Employer's Handbook: Healthcare, Retirement, and Fringe Benefit Tax Issues (4 hours - morning) - Webcast - #W80898	Online	\$185	\$235
Dec 15	Tax Planning for Small Businesses - Tax Staff Essentials (4 hours - morning) - Webcast - #W80904	Online	\$195	\$245
Dec 16	K2's Microsoft 365/Office 365 - All the Things You Need to Know [NT] - Webcast - #W80907	Online	\$315	\$390
Dec 16	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80905	Online	\$69	\$99
Dec 16	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80906	Online	\$69	\$99
Dec 17	K2's Next Generation Excel Reporting - Webcast - #W80909	Online	\$315	\$390
Dec 18	K2's Accountant's Guide to QuickBooks Online - Webcast - #W80911	Online	\$315	\$390
Dec 19	Ethical AI Practices for CPAs: Ensuring Responsible Use (2 hours - morning) [NT] - Webcast - #W80937	Online	\$89	\$119
Dec 29	K2's Excel Pivot Tables For Accountants - Webcast - #W80915	Online	\$315	\$390
Dec 30	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - morning) - Webcast - #W80916	Online	\$195	\$245
Dec 30	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80917	Online	\$195	\$245
<b>January 2026</b>				
Jan 07	Advanced Management and Leadership Essentials (2 hours - afternoon) [NT] - Webcast - #W80919	Online	\$69	\$99
Jan 13	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80922	Online	\$69	\$99
Jan 13	AI for Accountants - Practical Applications (2 hours - afternoon) - Webcast - #W80923	Online	\$69	\$99
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Portland - #11232	Portland	\$320	\$395
Jan 14	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80730	Online	\$320	\$395
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Eugene - #11233	Eugene	\$320	\$395
Jan 15	2025 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80731	Online	\$320	\$395
Jan 27	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80930	Online	\$185	\$235
<b>March 2026</b>				
Mar 13	Bankruptcy Basics: Understanding the Reorganization and Liquidation Process in These Uncertain Economic Times (2 hours - morning) - Webcast - #W80933	Online	\$105	\$120

**To register, click on the course title above or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.**



# Spring 2025 CFO Series



**Designed for CFOs, aspiring CFOs, senior level financial managers, and executives.**

CPE: 40 / Level: 2 (Intermediate)

## Day 1

Minding the GAAP - Webcast

May 15, 2025 - #W80738

## Day 2

Enhancing Productivity - Webcast

May 19, 2025 - #W80740

## Day 3

Doing the Right Things Right - 7 Tech & 1 [NT] - Webcast

June 10, 2025 - #W80761

## Day 4

Preparing for Trouble - 7 Tech & 1 [NT] - Webcast

June 16, 2025 - #W80771

## Day 5

Leading and Reporting - 2 Tech & 6 [NT] - Webcast

June 20, 2025 - #W80783

**Sign up by May 9 and save \$25.  
That's a savings of \$125 on the  
full series!**

**Questions:** Contact OSCP A at [profdev@orcpa.org](mailto:profdev@orcpa.org);  
503-641-7200 / 800-255-1470, ext. 3.

**Register:** [www.orcpa.org/cpe](http://www.orcpa.org/cpe)  
and enter the event code.



# OSCPA-Select™ 2025-26 Municipal Calendar

OSCPA is pleased to offer a variety of municipal programs for 2025-26 in consideration of the Oregon Board of Accountancy's Municipal Roster Requirements. View the requirements at <https://tinyurl.com/BOAMunicipal>.

## Scheduled programs for admission to municipal roster

Seminars identified with Level 1 (Basic) and Level 2 (Intermediate) may be used to qualify for admission to the Oregon Board of Accountancy's Municipal Roster. Subject areas that qualify for admission are provided in the Oregon Board of Accountancy's Rules for Qualifications for Admission to the Roster in OAR 801-020-0690 (refer to <https://tinyurl.com/BOAMunicipal>).

ADMITTANCE & CONTINUANCE				
Date	Course Title	Location	Member Fee	Nonmember Fee
<b>Level 1 (Basic) Programs - for Admittance and Continuance</b>				
Jun 16	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80772	Online	\$315	\$390
Jan 13	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80924	Online	\$315	\$390
<b>Level 2 (Intermediate) Programs - for Admittance and Continuance</b>				
Jun 04	Common Yellow Book & Single Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80753	Online	\$195	\$245
Jun 06	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Webcast - #W80757	Online	\$315	\$390
Jun 18	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80775	Online	\$315	\$390
<b>Level 3 (Advanced) Programs - for Continuance only</b>				
Sep 25	Advanced Topics in a Single Audit - Webcast - #W80840	Online	\$315	\$390
<b>Level 4 (Update) Programs - for Continuance only</b>				
May 20 - 21	Governmental Accounting & Auditing Conference (2 days) - Eugene - #11222	Eugene	\$439	\$539
May 20 - 21	Governmental Accounting & Auditing Conference (2 days) - Webcast - #W80713	Online	\$439	\$539
Jun 09	What's Changing in A&A for Governmental Entities (4 hours - morning) - NEW! - Webcast Replay - #W80759	Online	\$195	\$245
Nov 14	2025 Governmental Auditing Update: Yellow Book & Uniform Guidance (3 hours - morning) - Webcast Replay - #W80879	Online	\$105	\$145
Jan 26	Winter Governmental Auditing & Accounting Conference - Webcast - #W80729	Online	\$315	\$390

**To register, click on the course title above or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.**

## OSCPA-Select™ 2025-26 Not-for-Profit Calendar

Curated by OSCP to offer our not-for-profit members the knowledge they need to succeed in this important sector. Don't see the topic you're looking for? Contact our Professional Development Department, we want to hear from you.

ADMITTANCE & CONTINUANCE				
Date	Course Title	Location	Member Fee	Nonmember Fee
<b>Level 4 (Update) Programs</b>				
Jun 03	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80751	Online	\$315	\$390
Jun 06	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80756	Online	\$195	\$245
Sep 24	Accounting and Auditing Update for Not-for-Profits - Webcast - #W80838	Online	\$315	\$390

### Looking for more learning options?

Explore the entire 2025-26 OSCP Professional Development course schedule, including our extensive catalog of vendor-produced webcasts and webinars, as well as on-demand/self-study courses at [www.orcpa.org/cpe](http://www.orcpa.org/cpe).

**To register, click on the course title above or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.**

## Helpful Yellow Book Resources!

**Do you audit in the Yellow Book arena or are you interested in doing so?**

**Refer to these helpful resources to become familiar with the requirements.**

- **US Government Accountability Office (GAO)** — [www.gao.gov](http://www.gao.gov)
- **Government Auditing Standards (The Yellow Book)** — [www.gao.gov/yellowbook/overview](http://www.gao.gov/yellowbook/overview)
- **Government Auditing Standards: Guidance on GAGAS Requirements for Continuing Professional Education** — [www.gao.gov/products/GAO-05-568G](http://www.gao.gov/products/GAO-05-568G)
- **GAGAS Technical Assistance**  
202-512-9535; Email: [yellowbook@gao.gov](mailto:yellowbook@gao.gov)

Remember! Auditors conducting Yellow Book engagements should generally not count taxation courses toward their CPE requirements. There are a few exceptions to the rule. Practitioners should closely read the GAO statement. The GAO provides information in the document Guidance on GAGAS Requirements for Continuing Professional Education, which is a great resource for reviewing CPE compliance requirements.



## Actively participate and earn free CPE!

Committee volunteers are OSCP members – just like you – who share their knowledge and expertise to design high-quality conference programming for CPAs and their staff. The time commitment is minimal – most conferences are planned during two or three meetings.

**For more information and to get involved, visit [www.orcpa.org/get-involved](http://www.orcpa.org/get-involved)**



Walter Haig, CPA-WA

# Stay in the know

with nationally-recognized instructor Walter Haig

Walter Haig is one of the highest rated auditing and accounting instructors for classroom seminars and webinars in every state he has taught. He brings over four decades of practical experience and top-rated teaching experience to all his classroom seminars. OSCPA is excited to bring you three courses this June. Don't miss this chance to elevate your skills and knowledge to stay ahead of the curve.

## Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners

- June 25, 2025 - In-person - OSCPA Center, Beaverton - #11237
- June 25, 2025 - Webcast - #W80795

## Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable

- June 26, 2025 - In-person - OSCPA Center, Beaverton - #11238
- June 26, 2025 - Webcast - ##W80800

## Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update

- June 27, 2025 - In-person - OSCPA Center, Beaverton - #11239
- June 27, 2025 - Webcast - #W80803

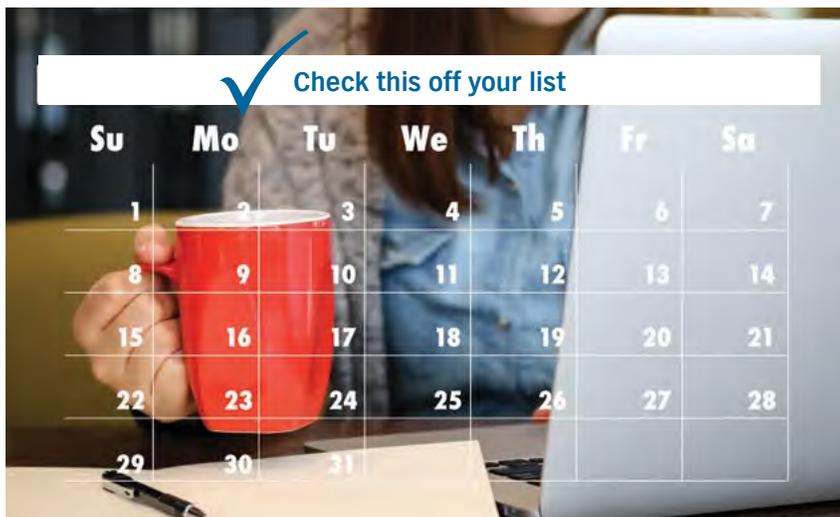
**Member Fee:** \$320 / **Nonmember Fee:** \$395

**CPE:** 8 / **Level:** 4 (Update)

**Producer:** CPA Education Services LLC



**To Register:** Scan the QR code or visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event code.



## Convenient on-demand CPE? Check.

On-demand CPE gives you the flexibility you need to maximize your time. Gain access to convenient learning option packages at special member savings through our partnerships with Surgent CPE and AICPA.

To order on-demand/self-study CPE packages, visit: [www.orcpa.org/online-catalog](http://www.orcpa.org/online-catalog) and click the On-Demand tab

# 2025 Spring & Summer Conferences



## ERISA Conference

May 13, 2025

In-person: [www.orcpa.org/cpe/11221](http://www.orcpa.org/cpe/11221)

Webcast: [www.orcpa.org/cpe/W80712](http://www.orcpa.org/cpe/W80712)



## Governmental Accounting & Auditing Conference

May 20-21, 2025

In-person: [www.orcpa.org/cpe/11222](http://www.orcpa.org/cpe/11222)

Webcast: [www.orcpa.org/cpe/W80713](http://www.orcpa.org/cpe/W80713)



## Farming, Ranching & Agribusiness Conference

May 30, 2025

Webcast: [www.orcpa.org/cpe/W80714](http://www.orcpa.org/cpe/W80714)



## Real Estate Conference

June 5, 2025

In-person: [www.orcpa.org/cpe/11223](http://www.orcpa.org/cpe/11223)

Webcast: [www.orcpa.org/cpe/W80715](http://www.orcpa.org/cpe/W80715)



## Technology Conference

June 12-13, 2025

Webcast: [www.orcpa.org/cpe/W80716](http://www.orcpa.org/cpe/W80716)



## Accounting & Auditing Conference

June 17, 2025

In-person: [www.orcpa.org/cpe/11224](http://www.orcpa.org/cpe/11224)

Webcast: [www.orcpa.org/cpe/W80717](http://www.orcpa.org/cpe/W80717)



## Forest Products Conference

June 24, 2025

Webcast: [www.orcpa.org/cpe/W80719](http://www.orcpa.org/cpe/W80719)



## Estate & Trust Conference

June 20, 2025

In-person: [www.orcpa.org/cpe/11225](http://www.orcpa.org/cpe/11225)

Webcast: [www.orcpa.org/cpe/W80718](http://www.orcpa.org/cpe/W80718)



## More ways to experience conferences:



Buy in bulk for your team - staff can watch as a group or on their own time.



Couldn't make the live event? Get the recording - with or without CPE.

See page 36 for more details.

# Bring your team the knowledge they need

## Two livestream webcast viewing options available:

### 1. Volume Discount: Individual Viewing Access

- Select this viewing option to register multiple individuals from your firm/business to view webcast individually from their own PC/laptop.
- Webcast confirmation emails, with unique webcast link, sent direct to each participant.
- Participants may ask questions of the speakers during the program.

**To order** Individual Option: Complete the Volume Discount: Individual Viewing Access Form at: [www.orcpa.org/vol-discount-access](http://www.orcpa.org/vol-discount-access) (one per conference).

Deadline to order is two business days prior to event start date.

### 2. Group Discount: Group Viewing Access

Conference viewed livestream as one group, as if you are physically at the conference.

- Participants view as a group in a firm/business conference/training room.
- Firm/business designates an employee to serve as Course Administrator to assure CPE credit for each participant.
- One group webcast link will be provided to Course Administrator.
- Participants may ask questions of the speakers during the program.
- **To order** Group Option: Complete the Group Discount: Group Viewing Access Form at: [www.orcpa.org/group-discount-access](http://www.orcpa.org/group-discount-access) (one per conference).

Deadline to order is two business days prior to event start date.

## Discount Fee Structure

For both livestream webcast viewing options: The first five participants are billed at the Tier 1 per person fee. Additional participants (6+) are billed at the Tier 2 per person fee.

Group CPE Livestream Webcast	Date	Tier 1 Fee: (2-5 Participants) per person	Tier 2 Fee: (6+ Participants) per person
Construction Industry Conference (8 hrs)	5/2/25	\$315	\$284
ERISA Conference (8 hrs)	5/13/25	\$315	\$284
Governmental Accounting & Auditing Conference (2 days)	5/20-21/25	\$439	\$396
Farming, Ranching & Agribusiness Conference (8 hrs)	5/30/25	\$315	\$284
Real Estate Conference (8 hrs)	6/5/25	\$315	\$284
Technology Conference with K2 Enterprises (2 days) (16 hrs)	6/12-6/13/25	\$599	\$540
Accounting & Auditing Conference (8 hrs)	6/17/25	\$315	\$284
Estate & Trust Conference (8 hrs)	6/20/25	\$315	\$284
Forest Products Conference (8 hrs)	6/24/25	\$315	\$284

## Two On-demand Training Packages:

### 1. Group CPE Training Package

Conference viewed through a link to the recorded program.

- To provide CPE credit, the Oregon Board of Accountancy requires you follow specific rules pertaining to CPE as the sponsor for your locally offered program.
- Firm/business supplies a qualified discussion leader to assure CPE credit for each participant. Minimum of two participants required plus your discussion leader.
- Fee includes on-site CPE Credit Compliance packet, discussion leader materials, and materials for two participants. For groups with more than two participants, additional materials are required for each participant.

On-demand Group CPE Training	Available Date	Group Fee 2 Participants	Materials Fee Per Person 3+ Participants
Not-for-Profit Conference (8 hrs - 7 Tech & 1 [NT])	5/7/25	\$355	\$99
Construction Industry Conference (8 hrs)	5/16/25	\$355	\$99
ERISA Conference (8 hrs)	5/27/25	\$355	\$99
Governmental Accounting & Auditing Conference (2 days)	6/4/25	\$499	\$109
Farming, Ranching & Agribusiness Conference (8 hrs)	6/13/25	\$355	\$99
Real Estate Conference (8 hrs)	6/19/25	\$355	\$99
Accounting & Auditing Conference (8 hrs)	6/27/25	\$355	\$99
Estate & Trust Conference (8 hrs)	6/27/25	\$355	\$99
Forest Products Conference (8 hrs)	6/27/25	\$355	\$99

**To order**

Visit [www.orcpa.org/on-demand](http://www.orcpa.org/on-demand)

### 2. Informational Package (No CPE)

- Not designed for CPE credit.
- Includes a link to the recorded program and one set of participant materials.

Informational Package (No CPE)	Available Date	Fee Per Person
Not-for-Profit Conference	5/7/25	\$199
Construction Industry Conference	5/16/25	\$199
ERISA Conference	5/27/25	\$199
Governmental Accounting & Auditing Conference (2 days)	6/4/25	\$219
Farming, Ranching & Agribusiness Conference	6/13/25	\$199
Real Estate Conference	6/19/25	\$199
Accounting & Auditing Conference	6/27/25	\$199
Estate & Trust Conference	6/27/25	\$199
Forest Products Conference	6/27/25	\$199

**To order**

Visit [www.orcpa.org/on-demand](http://www.orcpa.org/on-demand)



# Things You Should Know



## Materials:

- At time of registration for in-person OSCP Select™ seminars and conferences, participants may request electronic or hardcopy (print) materials.
- Deadline to order hardcopy (print) materials is 14 days prior to the event to ensure availability.
- Print materials are distributed onsite at the program unless otherwise indicated.
- Electronic materials will be distributed no more than two business days prior to an event.



## Cancellation Policy

- Cancellations received eight (8) or more days prior to the event will incur no penalty.
- Cancellations received seven (7) or fewer days prior to the event will be charged a \$25.00 cancellation fee or, without penalty you may: 1) send a substitute; 2) transfer your registration to another event of your choice.
- Registration fees can be transferred any time prior to the event date and will incur no penalty.
- Requests for same day transfers for the same event (in-person / webcast) will not incur a penalty.
- Requests for same day transfers to a different event will incur a \$25 cancellation fee.
- Requests for refund or transfer following the event date cannot be honored.
- Refunds will be returned to company/individual issuing original payments.



## Discounts

Did you know? The OSCP member rate for CPE courses is extended to all OSCP members and their employees who are not eligible for OSCP

membership. Members of other state CPA societies are also eligible for member rates. To receive the member rate, use code: MEMRATE

For more information on membership eligibility, please visit [www.orcpa.org/join](http://www.orcpa.org/join).



## Event Policies & Guidelines

### REGISTRATION FEE DEFINITIONS

**Member Fee:** Extended to all OSCP members, their employees not eligible for OSCP membership and members of other State CPA Societies. For membership eligibility information, see [www.orcpa.org/join](http://www.orcpa.org/join).

**Nonmember Fee:** Nonmembers (if not eligible under OSCP member fee definition) pay member fee, plus \$50 per four CPE credit hours or plus \$75 per eight CPE credit hours. For seminars less than four hours or more than eight hours, refer to course descriptions in OSCP's Online Professional Development Catalog.

**Academic Cooperation:** In recognition of the importance of providing the most current technical information available to those entering the profession, it is the policy of the OSCP to provide registrations to OSCP members that are full-time accounting educators at a reduced rate of 50% of member fee.

### INFORMATION REGARDING LIMITATION OF "NON-TECHNICAL" CPE FOR LICENSEE RENEWAL

The Oregon Board of Accountancy's OAR 801-40-040 limits the CPE that licensees can claim in non-technical areas to 16 hours per renewal period. Non-technical CPE may be identified as interpersonal management skills, communication, public relations, practice development, and business management & organization. This list is illustrative but not conclusive of subjects considered non-technical.

*(To assist OSCP program participants, the OSCP Professional Development Strategic Committee has analyzed and indicated those programs that we deem as non-technical CPE. Those programs are indicated with the non-technical symbol [NT]. Licensees should be aware that according to the Oregon Board of Accountancy requirements, the responsibility for substantiating that a particular program is acceptable and meets the requirements rest solely with the licensee.)*

### REGISTER EARLY & WALK-IN PARTICIPANTS

You are encouraged to register at least three weeks prior to each program or event. Capacity may be limited. Registration for some programs and events may close weeks in advance. Likewise, if there is insufficient advance registration, the program or event may be cancelled. Walk-in registration on the day of the program or event will be accepted only if space allows. Walk-in participants should come prepared with their own electronic device fully charged.

### CANCELLATION POLICY

- Cancellations received eight (8) or more days prior to the event will incur no penalty.
- Cancellations received seven (7) or fewer days prior to the event will be charged a \$25.00 cancellation fee.
- Registration fees can be transferred anytime prior to the event date and will incur no penalty.
- Requests for same day transfers for the same event (in-person / webcast) will not incur a penalty.
- Requests for same day transfers to a different event will incur a \$25 cancellation fee.
- Requests for refund or transfer following the event date cannot be honored.
- Refunds will be returned to company/individual issuing original payments.

### REFUNDS/CREDITS/TRANSFERS

- Refunds, credits, and transfers are issued based on OSCP Professional Development Cancellation Policy. They are issued in the form of full refunds, and refunds less cancellation fee.

- Refunds will be returned to company/individual issuing original payment.

### NO-SHOW REGISTRANTS

Refunds/credits will not be issued to no-show registrants. Materials will be provided to no-show registrants.

### SUBSTITUTIONS

Substitution of another individual for an established registrant will be accepted up to the start of registration of the in-person program.

### SHARED REGISTRATIONS/SPLITTING OF MULTI-DAY PROGRAMS

We regret we are unable to split registrations for OSCP programs between individuals. Non-registered participants will be charged. Multi-day classes also may not be split. The full registration fee will be charged even if a participant wishes to attend only a portion of a multi-day class.

### COURTESY

OSCP is committed to providing a professional and welcoming environment for all participants in both in-person and virtual events. Please be courteous when posing questions to the presenters and when posting chats. Participant comments and questions should be constructive, supportive, and use appropriate language. Inappropriate posts will be removed. Overly disruptive behavior by any participant may result in removal from the event. The registration fees, if any, may be refunded at the discretion of OSCP.

### REFRESHMENT BREAKS/LUNCHEON

In-person programs include refreshment breaks. Please refer to your registration confirmation to determine whether a luncheon is provided, or contact the OSCP Professional Development Division for assistance.

### MATERIALS

At time of registration for OSCP-Select™ in-person conferences, participants may request electronic or print materials. Print materials are distributed onsite at the program unless otherwise indicated. Electronic materials will be distributed no more than two business days prior to an event.

### LIMITATION OF DISTRIBUTION OF MATERIALS

Program materials developed for OSCP-sponsored presentations are intellectual property which belongs to the authors and therefore may not be distributed. Permission to download or print is granted exclusively to the paid attendee. The materials or portions thereof are not otherwise available for sale or unauthorized use.

### EVALUATIONS

Please complete the electronic evaluation form following every Professional Development program you attend. Your comments assist the OSCP Professional Development Strategic Committee in providing quality programming and speakers in a comfortable and professional environment. We appreciate your feedback.

### TECHNOLOGY USE

To ensure an optimum learning environment for all participants, cell phones must be silenced in the classroom. Laptop, tablet, and Wi-Fi use should not interfere with your learning nor that of others in the classroom.

### TRAVEL

If an event is cancelled, the OSCP is not responsible for penalties incurred

by registrants who must cancel travel arrangements. If you are booking airline travel, etc., we encourage you to contact the OSCPA to determine if a class will be held prior to purchasing your ticket.

## HOTEL ACCOMMODATIONS

OSCPA event participants are responsible for their own overnight lodging.

## SMOKING POLICY

In compliance with the Oregon Smokefree Workplace Law, all OSCPA events will be conducted in non-smoking meeting rooms. Smoking is permitted during breaks in areas of meeting facilities where indicated.

## ADVANCE PREPARATION POLICY

Advance preparation, when required, is important to maximize learning for all attending the program.

## ON-DEMAND / SELF-STUDY

OSCPA offers a wide variety of on-demand and self-study courses. To explore current course offerings, visit [www.orcpa.org/on-demand](http://www.orcpa.org/on-demand).

Please be advised that all sales are final as all materials are custom assembled for your unique order. This may include, but is not limited to, electronic and paper orders for On-demand Group CPE Training Packages and Informational Packages.

## CUSTOMIZED TEAM TRAINING

OSCPA can help you bring quality education right to your doorstep. We will work with you to tailor education to your specifications and timing, to provide professional learning when you want it and when you need it. Visit [www.orcpa.org/on-site](http://www.orcpa.org/on-site), or contact us at 503-641-7200 / 800-255-1470, ext. 3 or email [profdev@orcpa.org](mailto:profdev@orcpa.org).

## MISCELLANEOUS

- The opinions expressed by Discussion Leaders/Speakers and Panelists are not necessarily those of the Oregon Society of CPAs.
- The fees listed in OSCPA publications/promotional materials are subject to change without notice.
- In the case of unforeseen circumstances, topics are subject to change.
- The OSCPA reserves the right to make Discussion Leader/ Speaker substitutions at any time without notice.

- The OSCPA reserves the right to make facility substitutions and date changes as necessary. Although rare, if this does occur we make every effort to contact each pre-registered participant in advance.
- The OSCPA reserves the right to refuse service.
- Conference and seminar titles and topics are subject to change.

## RECORDINGS AT OSCPA EVENTS

By registering for and attending any OSCPA event or program, you agree to the following terms and conditions: OSCPA may audio and/or videotape and/or photograph participants and speakers/panelists at any OSCPA event. Pictures, audio recordings, or videotape recordings of OSCPA events may be used in future promotions for the Oregon Society of CPAs and/or its events, including in online and printed materials. Any pictures, audio tape recordings, or videotape recordings become the sole and exclusive property of the Oregon Society of CPAs.

## CPE CREDIT

CPE credit is issued to participants based on their full attendance at educational programs according to the credit hours determined for program structure. Due to Oregon Board of Accountancy rules, participant's individual CPE credit must be adjusted to an amount less than the total eligible credit if the attendee does not attend the entire program. In that instance, OSCPA will provide the attendee with an adjusted certificate of attendance reflecting the reduction of CPE credit. For in-person events, the participant's signature on the Program Attendance Record is required for CPE credit to be issued.

According to the Oregon Board of Accountancy's Oregon Administrative Rules pertaining to Continuing Professional Education, eligible CPE credit is measured by program length, with one 50-minute period equal to one CPE credit. CPE credits can be awarded in one-fifth increments or in on-half increments (0.5, 1.0, x.2, x.4, x.5, x.6, x.8, etc.). Additional information regarding credit allowed and evidence of completion can be found by visiting the Oregon Board of Accountancy's website under Administrative Rules 0030-801-040-0050.

## SPECIAL NEEDS

- Special Dietary Needs: Please indicate in writing on your registration form in the area marked "Special Needs," online in your profile, or contact the OSCPA at least seven days in advance.
- ADA: Please contact OSCPA upon registration. Advance notification is appreciated so we may properly assist you.

**For the most up-to-date OSCPA Event Policies and Guidelines,  
visit [www.orcpa.org/event-policies](http://www.orcpa.org/event-policies)**

## Questions?

**Contact OSCPA at 503-641-7200 / 800-255-1470, ext. 3; [profdev@orcpa.org](mailto:profdev@orcpa.org).**

# Oregon Board of Accountancy Resources

For your convenience, following is a helpful excerpt listing Oregon Administrative Rules (OARs), effective April 21, 2025, pertaining to Continuing Professional Education, Reinstatement requirements, and Municipal Audit CPE related to Admittance and Continuance. Refer to the Board's website at <https://tinyurl.com/OR-BOA-Rules> for the most current information.

## Chapter 801; Division 40: Continuing Professional Education

### 801-040-0010 Basic Requirements

**(1) Biennial CPE requirement for Active licensees.** Each biennial renewal period, certified public accountants and public accountants must report satisfactory evidence of having completed 80 hours of continuing professional education (CPE) unless such requirement is waived by the Board under ORS 673.165 and OAR 801-040-0150. The 80-hour CPE requirement must be completed as follows:

- (a) At least 20 of the required 80 CPE hours must be completed in each year of the renewal period. Hours carried forward from the previous reporting period (carry-forward hours) may not be used to meet the minimum annual requirement.
- (b) CPE hours must be completed during the two-year period immediately preceding the renewal date, except for carry-forward hours described in subsection (c) of this rule.
- (c) A maximum of 20 CPE hours may be carried forward from one reporting period to the next and may be used in partial fulfillment of the 80 hour requirement.
- (d) A minimum of four hours of ethics CPE must be included in the 80 hour CPE requirement.
- (e) CPE hours used for reinstatement may not be claimed on renewal application.

**(2) CPE Reciprocity.** Active licensees whose principal place of business is outside Oregon and who are seeking renewal of their permit shall be determined to have met the CPE requirement in OAR 801-040-0010(1) by meeting the CPE requirements for renewal of a certificate in the jurisdiction in which the licensee's principal place of business is located.

- (a) Applicants for renewal of an active permit shall demonstrate compliance with the CPE renewal requirements of the jurisdiction in which the licensee's principal place of business is located by signing a statement to that effect on the renewal application of this state, unless the provision of OAR 801-040-0010(2)b) applies.

- (b) Applicants for renewal of an active permit whose principal place of business is in a jurisdiction without CPE requirements for renewal are not eligible for the provision of OAR 801-040-0010 (2)(a) and must meet the CPE renewal requirements of this jurisdiction as set forth in OAR 801-040-0010(1).

**(3) Biennial CPE Requirements for Inactive Licensees.** A licensee who is granted inactive status must:

- (a) Obtain 32 hours of qualified continuing professional education during a two-year renewal period;
- (b) Complete four CPE hours in ethics which are included in the 32 hour requirement for each renewal period;
- (c) A maximum of 8 hours may be in non-technical subjects; and
- (d) A maximum of 8 CPE hours may be carried forward from one reporting period to the next and may be used in partial fulfillment of the 32 hour requirement.

**Statutory/Other Authority:** ORS 670.310, 673.040, 673.050 & 673.410

**Statutes/Other Implemented:** ORS 673.165

### 801-040-0020 Controls and Reporting

Reporting requirement. As a requirement for renewal of an active license, licensees are required to certify that the licensee has fulfilled the CPE requirement by signing or electronically affirming the certification section on the renewal form. Licensees are required to report the following information for each CPE program listed on the renewal form:

#### (1) CPE programs.

- (a) Name of program sponsor;
- (b) Program title;
- (c) Type of CPE program, using designations provided on renewal form;
- (d) For self-study programs, the program sponsor's Registry number;
- (e) Date(s) attended or date of completion; and

(f) Number of hours claimed.

**(2) Published articles and books.** The CPE report must include the following information for publications to be eligible for CPE credit:

- (a) Name and address of the publisher;
- (b) Title of publication;
- (c) Description of content;
- (d) Date of first publication; and
- (e) Number of hours claimed.

**Statutory/Other Authority:** ORS 670.310, 673.040, 673.050 & 673.410

**Statutes/Other Implemented:** ORS 673.165

### 801-040-0030

#### Programs that Qualify for CPE Credit

**(1) Qualifying programs.** In order to qualify for CPE credit under these rules, a CPE program must be a formal program of learning that contributes directly to the professional competence of the licensee. It is the obligation of each licensee to select a course of study that contributes to the licensee's professional competence in public accountancy. The licensee may take programs in a variety of topics that are relevant to their practice.

**(2) Program requirements.** CPE programs must meet the following requirements to qualify for CPE credit:

- (a) An outline of the program is prepared in advance and preserved;
- (b) A record of attendance is maintained by the sponsor for a period of five (5) years and evidence of completion is provided to participating licensees; and
- (c) The program is conducted by a qualified instructor whose background, training, education or experience qualifies the person to teach or lead a discussion on the subject matter of the particular program.

**(3) Eligible programs.** The following programs will qualify for CPE credit provided they also meet the requirements of section (2) of this rule:

- (a) Programs presented by national, state or local accounting organizations;
- (b) Programs offered by a firm to licensees;
- (c) Programs sponsored by organizations that provide professional educational programs on a regular basis;

(d) Accredited university or college courses in technical subjects as stated in OAR 801-040-0040(2) are eligible for CPE credit at the rate of 15 CPE hours for each semester hour credit and 10 CPE hours for each quarter hour credit. University or college courses that do not earn college credit are eligible for one CPE hour for each classroom hour of learning;

(e) Distance learning programs offered by a regionally accredited university or college are eligible for CPE credit as described in subsection (3)(d), without meeting the requirement of NASBA National CPE Registry approval described in section (4) of this rule.

(f) Other programs may qualify for CPE credit if the program meets the requirements of section 2 of this rule.

**(4) Individual study programs (self-study).** Correspondence courses or other individual study programs do not qualify for CPE credit unless the CPE sponsor is approved by the NASBA National CPE Registry. The sponsor registry number must be identified.

**(5) Blended Learning is an educational program incorporating different learning or instructional delivery methods, an educational program incorporating multiple learning formats such as lectures, discussion, guided practice, reading, games, cases studies, and simulation.**

**(6) Nano-learning Program.** Nano-learning program means a tutorial program designed to permit a participant to learn a given subject in a minimum 10 minute and less than 20 minute time frame through the use of electronic media and without interaction with a real-time instructor.

- (a) A nano-learning program differs from a self-study program in that it is typically focused on a single learning objective and is not paper-based.
- (b) A nano-learning program is not a group program.
- (c) Nano-learning is not a substitute for comprehensive programs addressing complex issues.
- (d) As evidence of satisfactory completion of the course, CPE program sponsors of nano-learning programs must require participants to successfully complete a qualified assessment with a passing grade of 100 percent before issuing CPE credit.
- (e) Assessments may contain questions of varying format.
- (f) Nano-learning credits must include a minimum of two questions.
- (g) True and False questions are not permissible on

the qualified assessment. If the participant fails the qualified assessment, then the participant must re-take the nano-learning program.

- (h) The number of re-takes permitted a participant is at the sponsor's discretion.

**(7) Programs not eligible for CPE credit.** The following programs do not qualify for CPE credit:

- (a) Courses taken to fulfill the requirements for licensure as a certified public accountant or public accountant;
- (b) Ethics courses that were taken to fulfill the Ethics exam requirement for licensure; and
- (c) CPA Exam Review.

**Statutory/Other Authority:** ORS 670.310, 673.040, 673.050 & 673.410

**Statutes/Other Implemented:** ORS 673.165

## 801-040-0040

### Acceptable Subject Matter

**(1) Examples listed not all-inclusive.** The subjects listed in this rule serve as examples only, and are not all inclusive of technical and non-technical subjects that may qualify for CPE credit.

**(2) Technical subjects.** Qualified continuing education programs in the following subjects are eligible for CPE credit as technical subjects:

- (a) Accounting
- (b) Auditing and assurance
- (c) Consulting
- (d) Specialized knowledge and applications
- (e) Management Advisory Services
- (f) Taxation
- (g) Professional ethics
- (h) Regulatory ethics
- (i) Finance
- (j) Business Law
- (k) Economics
- (l) Information Technology & Accounting Applications
- (m) Statistics
- (n) Data Analytics
- (o) Other subjects may be acceptable if they maintain

or improve the licensee's professional competence.

**(3) Non-technical subjects.** Qualified continuing education programs in subjects other than those listed in section (2) of this rule are non-technical subjects and are eligible for CPE credit if the program directly contributes to the licensee's professional competence.

- (a) Credit for programs in non-technical subjects is limited to 16 CPE hours per renewal period.
- (b) The following are examples of non-technical subjects:
  - (A) Interpersonal management skills;
  - (B) Public relations;
  - (C) Practice development;
  - (D) Practice administration.
  - (E) Marketing
  - (F) Personnel/HR
  - (G) Personal Development
  - (H) Communication
  - (I) Business Management & Organization

**Statutory/Other Authority:** ORS 670.310, 673.040, 673.050 & 673.410

**Statutes/Other Implemented:** ORS 673.165

## 801-040-0050

### Credit Allowed and Evidence of Completion

**(1) Credit hours.** Eligible CPE credit is measured by program length with one 50 minute period equal to one CPE credit. CPE credits can be awarded in one-fifth increments or in one-half increments (0.5, 1.0, x.2, x.4, x.5, x.6, x.8, etc.). Licensees may not report duplicate courses taken in the same reporting period unless there is proof that the course was substantially modified.

**(2) Evidence of completion.** Licensees are required to document all CPE programs claimed for CPE credit and to provide the appropriate proof of completion for the number of qualifying CPE credits claimed for each program. Licensees must retain proof of completion for each CPE program reported for a period of 5 years after completion of the program.

**(3) Group study programs.**

- (a) CPE credit is allowed for actual class hours attended.
- (b) Evidence of completion includes a written course outline and certificate of completion or attendance

record provided by each program sponsor. The evidence of completion must include the sponsor name, course title, date of attendance or date of completion, name of participating licensee, statement that the sponsor is included on NASBA's National Registry and providing the registry number, if appropriate, and the number of CPE hours earned;

#### **(4) Individual study programs.**

- (a) Individual study programs are eligible for CPE credit only if the program is offered by a NASBA National Registry approved sponsor.
- (b) CPE credit will be awarded in an amount equal to the average completion time determined by the NASBA National Registry approved sponsor.
- (c) The date for which CPE credit is allowed is the completion date specified on the evidence of completion provided by the sponsor.
- (d) Evidence of completion must include the name of the participating licensee, sponsor name, program title, date of completion, instructor name, if applicable, statement that the sponsor is included on NASBA's National Registry and provide registry number, if appropriate, and number of CPE hours allowed.

#### **(5) Nano-learning.**

- (a) Evidence of satisfactory completion of a nano-learning course requires the participant to successfully complete a qualified assessment with a passing grade of 100 percent.
- (b) A nano-learning program differs from a self-study program in that it is typically focused on a single learning objective and is not paper based.
- (c) Nano-learning credits are provided in .2 CPE hour increments.

#### **(6) Lecturer, discussion leader or speaker.**

- (a) CPE credit for a lecture, training session or speaking engagement at which the licensee was an instructor, discussion leader, or speaker is allowed provided that the lecture, training, or engagement meets CPE requirements for the participants;
- (b) CPE credit for a university or college course where the licensee was the faculty instructor is allowed, provided that the course is considered an upper division (300 or 400 level) or post-graduate course.
- (c) One CPE hour is allowed for each 50 minute period completed as an instructor or discussion leader for the first presentation of the subject material if

such activity increases the instructor's professional competence. CPE credit may be allowed for additional presentations if the substantive content of the program was substantially changed and the licensee provides evidence that such change required significant additional study or research.

- (d) CPE credit for preparation time allowed for an instructor, discussion leader, or a speaker shall be calculated on the basis of two CPE hours of preparation for each hour of teaching.
- (e) The maximum CPE credit allowed for preparation and teaching under this section and for published articles described in section (6) of this rule, combined, must not exceed one-half of the total number of CPE hours required for the renewal period.
- (f) Evidence of completion includes a copy of the agenda or outline provided for each presentation, lecture or speaking engagement, stating the date of presentation and name of the sponsoring organization. For university courses taught, evidence of completion should include the course syllabus and outline for each class.

#### **(7) Published articles.**

- (a) CPE credit may be allowed for authoring published articles or books, provided the work directly contributes to the professional competence of the licensee.
- (b) CPE credit for authoring published articles or books is allowed as of the date of publication and is only allowed for the first publication of such writing. The number of CPE hours is based on the time spent creating the published article.
- (c) Authorship of a published article does not contribute to the professional competence of the licensee unless the published article is suitable for a professional audience. Published articles may be reviewed on a case-by-case basis to determine whether such articles contribute to the licensee's professional competence.
- (d) The maximum credit for published articles and books allowed under this section and for preparation and teaching under section (5) of this rule, combined, is no more than one-half of the total CPE requirement for the renewal period.
- (e) A licensee may request additional CPE credit for authoring a published article by submitting an explanation of the circumstances which justify greater credit than is otherwise allowed. The Board shall determine whether additional credit is justified.

- (f) Evidence of completion includes a copy of the title page or other pages that show the title, date of publication, and a description of the content for each article reported for CPE credit.

## **(8) Reviewing peer review reports for Board approved Peer Review Programs.**

- (a) Licensees who serve as volunteer members of the Review Acceptance Body or any other committee that reviews peer review reports on behalf of a board approved peer review program are allowed two hours of CPE credit per meeting attended, for a maximum of 16 hours for the renewal period.
- (b) Evidence of completion includes proof of attendance, provided by the sponsor of the approved Peer Review Program, for each meeting attended.

## **(9) University and college courses.**

- (a) CPE credit allowed is described in OAR 801-040-0030.
- (b) An official copy of the college transcript from a regionally accredited college/university is evidence of completion for courses that earn college credit.
- (c) An attendance schedule or sign-in sheet demonstrating the licensee's attendance, prepared and maintained by the college, will provide evidence of completion for courses that do not earn college credit.

**Statutory/Other Authority:** ORS 670.310, 673.040, 673.050 & 673.410  
**Statutes/Other Implemented:** ORS 673.165

### **801-040-0070 CPE Audit**

**(1) The Board may audit CPE reports submitted by licensees.** When a licensee is selected for audit of CPE hours, licensees are required to submit, using the NASBA CPE audit service, the following:

- (a) All appropriate documentation that confirms attendance of all CPE programs and the number of eligible CPE hours; and
- (b) Any additional information required.

**(2) Licensees must comply with all requests for information and any applicable deadlines for submitting information as required.**

**Statutory/Other Authority:** ORS 670.310 & 673.410  
**Statutes/Other Implemented:** ORS 673.165

### **801-040-0095**

Reinstatement Requirements: Inactive to Active Status

The provisions of this rule are removed from this section and included in OAR 801-010-0130 to minimize duplication.

**Statutory/Other Authority:** ORS 670.310  
**Statutes/Other Implemented:** ORS 673.165

### **801-040-0100**

#### **New Licenses/Reinstated Licenses**

#### **(1) CPE Requirement**

- (a) Licensees who receive an initial license to practice public accountancy shall comply with the CPE requirements from the date of issuance of the license on a prorated basis calculated at 3 CPE hours per month, including the month of issuance, until the end of the renewal period in which the license is issued.
- (b) The 20 hour annual CPE requirement shall also be prorated at two (2) CPE hours per month, including the month of issuance, until the end of the renewal period in which the license is issued.
- (c) CPE hours earned during any month of the two-year renewal cycle during which the initial license was issued shall be eligible to meet the initial CPE requirement.
- (d) The maximum credit allowed for non-technical CPE hours is no more than 20% of the prorated CPE hours due.

#### **(2) Requirement for licensed public accountants who become licensed as certified public accountants.**

Licensees who hold a license to practice public accountancy as a licensed public accountant under ORS 673.100, and who receive an initial certificate and license to practice public accountancy as a certified public accountant shall, in addition to the requirement under section (1) of this rule, complete and report 3 CPE hours for each month of the renewal period during which the person held a license as a public accountant. CPE hours earned during any month of the two year renewal cycle during which the initial license was issued shall be eligible for credit to meet this requirement.

**Statutory/Other Authority:** ORS 670.310, 673.040,  
673.050 & 673.410  
**Statutes/Other Implemented:** ORS 673.165

**801-040-0150**  
**Waivers**

**(1) CPE waivers.** The Board, in its discretion, may waive CPE requirements for:

- (a) Reasons of health, certified by a medical doctor, that prevent the licensee from complying with CPE requirements;
- (b) A licensee who is on extended active military duty, who does not practice public accountancy during the renewal period, and who provides a copy of orders to active military duty; and
- (c) Other good cause, to be determined by the Board on a case-by-case basis.

**(2) Requests for waivers.** A request for waiver of CPE requirements must be submitted in writing for each renewal period during which the conditions supporting the waiver exist.

**Statutory/Other Authority:** ORS 670.310, 673.040,  
673.050 & 673.410  
**Statutes/Other Implemented:** ORS 673.165 & 673.170

**801-040-0160**  
**Failure to Comply**

**(1) CPE Penalty**

- (a) Active Licensees. Licensees who submit an application for renewal of an active license and who do not comply with the CPE requirements described in OAR 801-040-0010 are required to complete and report an additional 16 hours of qualifying CPE.
- (b) Inactive licensees. Licensees who submit an application for renewal of an inactive license and who do not comply with the CPE requirements described in OAR 801-040-0010 are required to complete and report an additional 8 hours of qualifying CPE.

**(2) Failure to comply with CPE requirements.** Licensees who do not meet the CPE requirements may not be renewed and may be subject to disciplinary action under ORS 673.170(2)(L), unless CPE requirements have been waived under OAR 801-040-0150.

**Statutory/Other Authority:** ORS 670.310 & 673.410  
**Statutes/Other Implemented:** ORS 673.165 & 673.170



**Oregon Board of Accountancy  
Chapter 801**

**Division 20  
MUNICIPAL AUDITS**

**801-020-0620**

**Bidding and Contracting for Municipal Audits**

**(1) Municipal Roster.** The Oregon Board of Accountancy is authorized by ORS 297.670 to prepare and maintain the Municipal Roster of licensees who are authorized to conduct municipal audits required by ORS 297.425.

**(2) Requirement for firm registration.** Municipal audits required by ORS 297.425 may only be conducted through a Firm registered under the provisions of ORS 673.160.

**(3) Licensees authorized to bid and contract for municipal audits.** The following licensees who are admitted to the Municipal Roster may bid and contract for municipal audits in accordance with ORS 297.465:

- (a) A licensed CPA who is a sole proprietor and registered under ORS 673.160;
- (b) A licensed PA under ORS 673.100 who passed the audit section of the CPA Exam as a requirement for licensing and who is registered under ORS 673.160;

**(4) Firms authorized to bid and contract for municipal audits.** Bids, contracts and municipal audits may be issued in the name of a Firm under the following circumstances:

- (a) A licensee who is a member of a Firm, and who is on the Municipal Roster, may bid, contract or issue municipal audits in accordance with ORS 297.465 under the name of such Firm if all owners of the Firm are on the municipal roster; or
- (b) A Firm that has at least one member who is on the Municipal Roster may bid, contract or issue municipal audits in the name of the Firm only if the contract and the related audit report are both signed in the name of the Firm by the member who is on the Municipal Roster.
- (c) For purposes of this rule, "member" means a partner, shareholder, or owner of the firm. Any other licensee, including an independent contractor, office sharer or licensee working for or with a firm on a limited basis is not a member.

**(5) Except as provided in this rule, no person may bid, contract or otherwise offer to issue or issue an audit under ORS 297.405 to 297.555.**

**Statutory/Other Authority:** ORS 297.670, 297.680 & 297.740

**Statutes/Other Implemented:** ORS 297.680

**801-020-0690**

**Qualifications for Admission to Municipal Roster**

**(1) Eligibility.** The following licensees are eligible to apply for admission to the municipal roster:

- (a) Individuals holding an active CPA permit issued under ORS 673.150;
- (b) Individuals holding an active PA license issued under ORS 673.100 prior to January 1, 2002;
- (c) Individuals holding an active PA license issued under ORS 673.100 who were licensed after January 1, 2002 and who passed the audit section of the CPA Exam as a requirement of licensing; or
- (d) Individuals with an active CPA license issued by another jurisdiction that is recognized by the Board and who have authority to practice public accountancy in Oregon under ORS 673.153.

**(2) Application Requirements.** Qualified applicants for admission to the municipal roster must meet the following requirements:

- (a) The applicant must be a licensee in good standing with the Oregon Board or with the jurisdiction in which the applicant is licensed if a municipal-only authorization is sought through substantial equivalency;
- (b) Every application shall be on a form provided by the Board and shall be accompanied by fee prescribed by OAR 801-010-0010; and
- (c) The application, signed by the applicant, shall constitute an agreement between the applicant and the Board that the applicant will comply with the provisions of the Municipal Audit Law, ORS 297.405 through 297.555 and OAR Chapter 801 Division 020.
- (d) Applications for the municipal auditor license must be completed within 3 months from the date the application was received in the Board office.

**(3) Grounds for Denial.** In addition to the specific grounds stated in ORS 673.170(2), the Board may deny admission or reinstatement to the municipal roster if:

- (a) The applicant has not complied with the requirements of OAR 801-020-0620;
- (b) The applicant has committed any act or engaged in conduct that reflects adversely on the licensee's fitness to practice public accountancy; or

- (c) The applicant:
- (A) Committed any act or engaged in conduct that would cause a reasonable person to have substantial doubts about the applicant's honesty, fairness and respect for the rights of others or for any law.
- (B) Committed any act or conduct that resulted in a criminal conviction, other than a crime described in ORS 673.170(2)(h) or (i), will not be used to deny admission to the municipal roster unless such act or conduct is rationally connected to the applicant's fitness to practice public accountancy.

**(4) Initial CPE Requirements.** The applicant shall demonstrate to the satisfaction of the Board that, within the two year period immediately preceding the date of application to the municipal roster, the applicant completed 40 CPE hours of Level 1 (basic) or Level 2 (intermediate) education in the following subjects, including at least 4 hours in each subject:

- (a) Audits of state and local governmental units;
- (b) Governmental accounting and financial reporting standards;
- (c) Generally Accepted Governmental Auditing Standards;
- (d) Audits of federal programs including OMB Uniform Guidance and other authoritative sources;
- (e) Oregon Local Budget Law; and
- (f) Minimum standards of audits and reviews of Oregon municipal corporations.

**(5) CPE Credit.** The 40 hours of education required for admission to the municipal roster may be included in the 80 hours of CPE required for renewal of the CPA/PA permit.

**(6) Approval.** When an application to the municipal roster is approved, the Board shall:

- (a) Notify the applicant in writing that the application is approved;
- (b) Enter the applicant's name on the municipal roster; and
- (c) Publish approved municipal auditors on the Board's website.

**Statutory/Other Authority:** ORS 297.670, 297.680 & 297.740

**Statutes/Other Implemented:** ORS 297.680

### 801-020-0700

#### Qualifications for Continuance on Roster

**(1) Renewal.** The renewal of authorization to conduct municipal audits is accomplished with the licensee's biennial renewal. Licensees who wish to renew authorization to conduct municipal audits must include the following information with the biennial renewal application:

- (a) A statement that the licensee wishes to renew authority to conduct municipal audits;
- (b) Payment of the municipal auditor renewal fee described in OAR 801-010-0010; and
- (c) A report of the correct number of CPE hours required for municipal auditors.

**(2) Continuing CPE Requirement.** Licensees admitted to the municipal roster are required to complete 24 hours of CPE in subjects directly related to the governmental environment and governmental auditing during each renewal period. The required number of CPE hours for renewal may include CPE programs of any level (basic, intermediate, advanced or updates). At least 16 of the 24 CPE hours required must be in one or more of the following subjects:

- (a) Audits of state and local governmental units;
- (b) Governmental accounting and financial reporting standards and updates;
- (c) Generally Accepted Governmental Auditing Standards and updates;
- (d) Single Audit Act and related circulars and supplements published by the Government Accountability Office, Office of Management and Budget;
- (e) Oregon Local Budget Law; or
- (f) Minimum standards of audits and reviews of Oregon municipal corporations.

**(3) Limitation.** No more than 8 of the 24 required hours may be in courses relating to generally accepted auditing standards and procedures. Courses that make up the 8 hours described herein may include such topics as current developments in audit methodology, assessment of internal controls and statistical sampling.

**(4) CPE credit.** The 24 hours of CPE required for renewal of municipal audit authority may be included in the 80 hours of CPE required for renewal of the CPA/PA permit. During the first renewal period after appointment to the municipal roster, the 24 hour CPE requirement shall be

prorated at one (1) CPE hour per month.

**(5) The Board will pro-rate a license's first municipal auditor renewal fee in six month increments, depending on the date of issuance.**

**Statutory/Other Authority:** ORS 297.670, 297.680 & 297.740

**Statutes/Other Implemented:** ORS 297.680

**801-020-0720**

**Removal, Suspension and Reinstatement to the Municipal Roster**

**(1) Removal.** Licensees may be removed from the municipal roster for the following reasons:

- (a) Failure to pay the biennial fee required by OAR 801-020-0700;
- (b) Failure to complete the required CPE described in OAR 801-020-0700; or
- (c) Failure to maintain an active CPA/PA permit in good standing as required by OAR 801-020-0690.
- (d) Licensees whose CPA/PA permits lapse as described in OAR 801-010-0130, or who fail to renew the authorization to conduct municipal audits as described in OAR 801-020-0720 shall be removed from the municipal roster.

**(2) Suspension.** Licensees may be suspended from the municipal roster for:

- (a) Failure to comply with the provisions of the Oregon Municipal Audit Law, ORS 297.405 through 297.555; or
- (b) Any of the reasons stated as grounds for denial in OAR 801-020-0690(3).

**(3) Reinstatement.** Licensees who wish to be reinstated to the municipal roster are required to hold an active CPA/PA permit in good standing.

- (a) Two years or less. A licensee seeking to be reinstated to the municipal roster within the two year period following the date such licensee was removed from the roster is required to:
  - (A) Pay the appropriate fee stated in OAR 801-010-0010; and
  - (B) Complete and report 24 hours of CPE as described in OAR 801-020-0700. , plus a 16-hour CPE penalty.
- (b) More than two years. A licensee seeking to be reinstated to the municipal roster more than two years after the date such licensee was removed from the roster is required to:

- (A) Pay the appropriate fee stated in OAR 801-010-0010; and
- (B) Meet the requirements for initial admission to the municipal roster described in OAR 801-020-0690.
- (c) Suspension. Approval of reinstatement applications submitted by licenses who are suspended from the municipal roster, or whose CPA or PA permit has been suspended by the Board of Accountancy, is subject to the discretion of the Board. Licensees under this section are required to:
  - (A) Meet all conditions and terms of the suspension order;
  - (B) Pay the appropriate fee stated in OAR 801-010-0010;
  - (C) Meet the requirements for initial admission to the municipal roster described in OAR 801-020-0690; and
  - (D) Complete and report a 16-hour CPE penalty.
- (d) CPE requirements for reinstatement. All CPE hours required for reinstatement to the municipal roster, including CPE penalty hours, must be in subjects directly related to the governmental environment and governmental auditing and must be completed within two years preceding the date of the reinstatement application.

**Statutory/Other Authority:** ORS 297.670, 297.680 & 297.740

**Statutes/Other Implemented:** ORS.297.680 & 297.710

## For Further Information:

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Salem, OR 97302-6307

Phone: 503-378-4181

Web: <https://tinyurl.com/OR-BOA-Rules>

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