| DATE         | TITLE                                                                 | TIME         | SPEAKER                  | FIELD OF STUDY                  | CPE CREDIT |
|-------------|----------------------------------------------------------------------|--------------|--------------------------|---------------------------------|------------|
| Oct 19, 2022| 2022 Tax Updates for Individuals                                     | 10 am        | Barbara Weltman          | Taxes (1 hour)                   | 1          |
| Oct 19, 2022| Private Foundation Pitfalls: Self-Dealing, Taxable Expenditures, and More | 2 pm         | Sarah Huang, Clark Nuber | Taxes (2 hours)                  | 2          |
| Oct 20, 2022| 2022 Individual Planning and Due Diligence (Half-Day Webinar)        | 10 am        | Annette Nellen           | Information Technology           | 4          |
| Oct 20, 2022| Leveraging Big Data for Public Accounting                             | 11 am        | Stephen Yoss             |                                  | 2          |
| Oct 20, 2022| Mastering Excel's Custom Views Feature                               | 2 pm         | David Ringstrom          | Computer Software & Applications | 2          |
| Oct 21, 2022| 2022 Individual Federal Tax Update (Half-Day Webinar)                | 10 am        | Greg White               | Taxes (4 hours)                  | 4          |
| Oct 21, 2022| Audit Evidence Standard SAS 142: Good or Bad                         | 2 pm         | Pat Patterson             | Auditing (2 hours)               | 2          |
| Oct 21, 2022| Settling Your Tax Bill for Less: Myths vs. Reality                  | 11 am        | Jim Buttonow             | Taxes (2 hours)                  | 2          |
| Oct 24, 2022| Accounts Payable Best Practices for Financial Professionals           | 11 am        | Mary Schaeffer           | Accounting (2 hours)             | 2          |
| Oct 24, 2022| California Tax Update: Part 1                                        | 2 pm         | Eva Rosenberg            | Taxes (3 hours)                  | 3          |
| Oct 24, 2022| How to Audit under the New Leasing Standard                          | 2 pm         | Salvatore Collemi        | Accounting (1 hour), Auditing (1 hour) | 2          |
| Oct 25, 2022| California Tax Update: Part 2                                        | 2 pm         | Eva Rosenberg            | Taxes (2 hours)                  | 2          |
| Oct 25, 2022| Section 1202 and Qualified Small Business Stock                      | 11 am        | Jennifer Kowal           | Taxes (2 hours)                  | 2          |
| Oct 26, 2022| Becoming a Tax Ninja: Tax Accounting Methods Part 3                  | 2 pm         | Greg White               | Taxes (2 hours)                  | 2          |
| Oct 26, 2022| Managing a Residency Audit                                          | 9 am         | Hodgson Russ LLP, Andrew Wright, Daniel Kelly, Timothy Noonan, K. Craig Reilly, Hodgson Russ LLP | Taxes (2 hours) | 2          |
| Oct 26, 2022| Multistate Tax Issues for Financial Services                         | 11 am        | Robert Minniti           | Auditing (Governmental)          | 2          |
| Oct 27, 2022| Internal Controls for Smaller Not-For-Profit and Governmental Entities | 2 pm         | Annette Nellen           | Taxes (2 hours)                  | 2          |
| Oct 27, 2022| Monthly Tax Update (October)                                         | 11 am        | Greg White               | Taxes (4 hours)                  | 4          |
| Oct 28, 2022| 2022 Business Federal Tax Update (Half-Day Webinar)                 | 10 am        | Mary Schaeffer           | Accounting (2 hours)             | 2          |
| Oct 28, 2022| Creating an Effective and Efficient Travel and Entertainment Expense Reimbursement Policy | 11 am        | Pat Patterson             | Auditing (2 hours)               | 2          |
| Oct 28, 2022| What About New Quality Management Standard, SQMS No. 1?               | 2 pm         | Greg White               | Taxes (2 hours)                  | 2          |
| Oct 31, 2022| Becoming a Tax Ninja: Tax Accounting Methods Part 4                  | 11 am        | Jennifer Kowal           | Taxes (2 hours)                  | 2          |
| Oct 31, 2022| Like-Kind Exchanges: Qualify as a Valid Section 1031 Exchange        | 2 pm         | Klaralee Charlton        | Taxes (2 hours)                  | 2          |
| Nov 1, 2022 | Costly Pitfalls in Old Estate Planning Documents                     | 11 am        | Susan Harper             | Auditing (2 hours)               | 2          |
| Nov 1, 2022 | Financial Statement Fraud                                           | 9 am         | Pat Patterson             | Auditing (2 hours)               | 2          |
| Nov 1, 2022 | First SQMS No. 1 and Now SQMS No. 2                                 | 2 pm         |                          |                                 | 2          |
| Date       | Event                                      | Time  | Speaker            | Department                  | Duration   |
|------------|--------------------------------------------|-------|--------------------|-----------------------------|------------|
| Nov 1, 2022| Major Program Determination                | 11 am | Diane Edelstein    | Auditing (Governmental)     | 2          |
| Nov 2, 2022| Analyzing Financial Efficiency and Performance Ratios | 2 pm  | Lynn Fountain      | Auditing (2 hours)          | 2          |
| Nov 2, 2022| Form 1099-MISC Explained                  | 11 am | Steven Mercatante  | Taxes (2 hours)             | 2          |
| Nov 2, 2022| New Auditor's Reporting Standards          | 9 am  | Salvatore Collemi  | Auditing (2 hours)          | 2          |
| Nov 3, 2022| How to Onboard the New IRS Representation Client | 2 pm  | Eric Green        | Taxes (2 hours)             | 2          |
| Nov 3, 2022| Local Tax Issues for Multistate Businesses | 11 am | Debra Herman       | Hodgson Russ LLP (Taxes 2 hours) | 2          |
| Nov 3, 2022| SAS 146: Quality Management for an Engagement Conducted in Accordance with GAAS | 9 am  | Pat Patterson     | Auditing (2 hours)          | 2          |
| Nov 4, 2022| 2022 Form 1099 & W-9 Annual Update        | 2 pm  | Miles Hutchinson   | Taxes (2 hours)             | 2          |
| Nov 4, 2022| 2022 Individual Federal Tax Update (Half-Day Webinar) | 10 am | Greg White       | Taxes (4 hours)             | 4          |
| Nov 4, 2022| Payroll Fraud                             | 11 am | Robert Minniti    | Accounting (1 hour), Auditing (1 hour) | 2          |
| Nov 7, 2022| Funding the Marital Share                  | 9 am  | Klaralee Charlton | Taxes (2 hours)             | 2          |
| Nov 7, 2022| Handling Changes to W-8 and W-9            | 2 pm  | Steven Mercatante  | Taxes (2 hours)             | 2          |
| Nov 7, 2022| Materiality Changes                       | 11 am | Pat Patterson     | Auditing (2 hours)          | 2          |
| Nov 8, 2022| Capital Gain or Ordinary Income?           | 11 am | Jennifer Kowal     | Taxes (2 hours)             | 2          |
| Nov 8, 2022| How to Avoid the Most Common Errors in Tax Problem Solving | 2 pm  | Jim Buttonow      | Taxes (2 hours)             | 2          |
| Nov 9, 2022| 2022 Federal Tax Update (Full-Day Webinar) | 9 am  | Bradley Burnett   | Taxes (8 hours)             | 8          |
| Nov 9, 2022| CPAs Guidebook for Ethical Behavior: Code of Professional Conduct | 2 pm  | Allison McLeod    | Regulatory Ethics (2 hours) | 2          |
| Nov 9, 2022| Governmental Accounting and Auditing Update: Year-End Planning | 11 am | Eric Berman      | Accounting (Governmental) (1 hour), Auditing (Governmental) (1 hour) | 2          |
| Nov 10, 2022| 2022 Individual Planning and Due Diligence (Half-Day Webinar) | 10 am | Annette Nellen    | Taxes (4 hours)             | 4          |
| Nov 10, 2022| QuickBooks/Excel Report Speed Tips: Part 1 | 2 pm  | David Ringstrom   | Computer Software & Applications (2 hours) | 2          |
| Nov 10, 2022| Sales and Use Tax Considerations for Early Stage Companies | 11 am | Hodgson Russ LLP K. Craig Reilly Ariele Doolittle | Taxes (2 hours) | 2          |
| Nov 11, 2022| 2022 Business Federal Tax Update (Half-Day Webinar) | 10 am | Greg White       | Taxes (4 hours)             | 4          |
| Nov 11, 2022| An Overview of 2022 FBAR Issues: Filing Standards, Willfulness, and Handling Examinations | 2 pm  | Patrick McCormick | Taxes (2 hours)             | 2          |
| Nov 11, 2022| Non-Fungible Tokens                       | 11 am | Cory Campbell     | Information Technology (2 hours) | 2          |
| Nov 14, 2022| A Closer Look Into Installment Sales       | 11 am | Jennifer Kowal    | Taxes (2 hours)             | 2          |
| Nov 14, 2022| A Comprehensive NFP GAAP Update: What's New and Upcoming | 9 am  | Clark Nuber       | Accounting (1 hour), Auditing (1 hour) | 2          |
| Nov 14, 2022| SSARS 26 and Quality Management            | 2 pm  | Pat Patterson     | Auditing (2 hours)          | 2          |
| Nov 15, 2022| 2022 Tax Updates for Businesses           | 1 pm  | Barbara Weltman   | Taxes (1 hour)              | 1          |
| Nov 15, 2022| Help Clients Deal with Tax Law Challenges: Using Practical Planning Strategies | 9 am  | Steven Siegel     | Taxes (2 hours)             | 2          |
| Nov 15, 2022| Testing Internal Controls in a Single Audit | 11 am | Diane Edelstein   | Auditing (Governmental) (2 hours) | 2          |
| Nov 15, 2022| W-9 Best Practices                        | 2 pm  | Steven Mercatante | Taxes (2 hours)             | 2          |
| Date          | Event Description                                                                 | Time  | Speaker(s)                                      | Category(ies)                      | Duration  |
|--------------|-----------------------------------------------------------------------------------|-------|------------------------------------------------|-----------------------------------|-----------|
| Nov 16, 2022 | 2022 GAAP, GAAS, & SSARS Update                                                   | 2 pm  | Pat Patterson                                   | Accounting (1 hour), Auditing (1 hour) | 2         |
| Nov 16, 2022 | 2022 Tax Updates for Individuals                                                  | 10 am | Barbara Weltman                                 | Taxes (1 hour)                     | 1         |
| Nov 16, 2022 | Nexus in the Era of Telecommuting and Market-Based Sourcing                       | 9 am  | Hodgson Russ LLP Christopher Doyle Emma Savino | Taxes (2 hours)                    | 2         |
| Nov 16, 2022 | Taxation of the Family Home                                                        | 11 am | Mary Schaeffer                                  | Taxes (2 hours)                    | 2         |
| Nov 16, 2022 | Cybersecurity for Tax Professionals                                                | 2 pm  | Robert Minniti                                  | Taxes (2 hours)                    | 2         |
| Nov 17, 2022 | S Corporation Taxation: State of the Art Tax Strategies: Part 1 (Half-Day Webinar) | 10 am | Greg White                                     | Taxes (4 hours)                    | 4         |
| Nov 18, 2022 | Travel and Entertainment Best Practices: Prevent Fraud and Comply with IRS Regs    | 11 am | Jennifer Kowal                                  | Auditing (2 hours)                 | 2         |
| Nov 18, 2022 | QuickBooks/Excel Report Speed Tips Part 2                                          | 2 pm  | Klaralee Charlton                              | Taxes (2 hours)                    | 2         |
| Nov 18, 2022 | Substantiation of Business Expenses                                                | 11 am | Salvatore Collemi                              | Taxes (2 hours)                    | 2         |
| Nov 21, 2022 | State Tax Considerations When Selling a Business                                  | 9 am  | Hodgson Russ LLP K. Craig Reilly Katherine McDonald | Taxes (2 hours)                    | 2         |
| Nov 21, 2022 | Tax Breaks, Tips, and Updates: Part 1                                              | 2 pm  | Eva Rosenberg                                   | Taxes (2 hours)                    | 2         |
| Nov 22, 2022 | Basic Partnership Taxation (Half-Day Webinar)                                      | 10 am | James Hamill                                    | Taxes (4 hours)                    | 4         |
| Nov 22, 2022 | Tax Breaks, Tips, and Updates: Part 2                                             | 2 pm  | Eva Rosenberg                                   | Taxes (2 hours)                    | 2         |
| Nov 22, 2022 | Trust Fundamentals: A Practical Primer for Tax Practitioners                       | 11 am | Steven Siegel                                   | Taxes (2 hours)                    | 2         |
| Nov 23, 2022 | 2022 Business Tax Update (Full-Day Webinar)                                       | 9 am  | Bradley Burnett                                 | Taxes (8 hours)                    | 8         |
| Nov 23, 2022 | Automation for Increasing Personal Efficiency and Effectiveness                   | 2 pm  | Stephen Yoss                                    | Information Technology (2 hours)   | 2         |
| Nov 23, 2022 | Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar) | 10 am | Allison McLeod                                 | Regulatory Ethics (4 hours)        | 4         |
| Nov 28, 2022 | OCBOA: Something Old, Something New                                                | 2 pm  | Pat Patterson                                   | Accounting (2 hours)               | 2         |
| Nov 28, 2022 | S Corporation Taxation: State of the Art Tax Strategies: Part 2 (Half-Day Webinar) | 10 am | Greg White                                     | Taxes (4 hours)                    | 4         |
| Nov 29, 2022 | 2022 S Corporation Update: Developments You Need to Know                          | 11 am | Greg White                                     | Taxes (2 hours)                    | 2         |
| Nov 29, 2022 | Employee Fraud: The Misappropriation of Assets                                     | 2 pm  | Robert Minniti                                  | Accounting (2 hours)               | 2         |
| Nov 29, 2022 | Intermediate Partnership Taxation (Half-Day Webinar)                                | 10 am | James Hamill                                    | Taxes (4 hours)                    | 4         |
| Nov 30, 2022 | Accountants and Malpractice: Can We Get Sued for This?                             | 2 pm  | Allison McLeod                                 | Regulatory Ethics (2 hours)        | 2         |
| Nov 30, 2022 | Monthly Tax Update (November)                                                       | 11 am | Annette Nellen                                  | Taxes (2 hours)                    | 2         |
| Dec 1, 2022  | 2022 Individual Federal Tax Update (Half-Day Webinar)                              | 10 am | Greg White                                     | Taxes (4 hours)                    | 4         |
| Dec 1, 2022  | Bringing Artificial Intelligence to Your Organization                              | 2 pm  | Stephen Yoss                                    | Information Technology (2 hours)   | 2         |
| Dec 1, 2022  | Multistate Income Allocation and Apportionment                                      | 11 am | Open Banks Hodgson Russ LLP                    | Taxes (2 hours)                    | 2         |
| Dec 2, 2022  | 2022 Best Practices: W2 & W4 Update                                                | 2 pm  | Miles Hutchinson                                | Taxes (2 hours)                    | 2         |
| Dec 2, 2022  | 2022 Business Federal Tax Update (Half-Day Webinar)                                | 10 am | Greg White                                     | Taxes (4 hours)                    | 4         |
| Dec 2, 2022  | Governmental Accounting and Auditing Update: SAS 134-145 Update                    | 11 am | Kurt Schlicker                                  | Accounting (Governmental) (1 hour), | 2         |
| Date       | Event                                                                 | Time  | Speaker(s)                                | Categories                                      | Hours |
|-----------|----------------------------------------------------------------------|-------|-------------------------------------------|------------------------------------------------|-------|
| Dec 5, 2022 | Making Your Resolutions Work: Create Your 30 Day Personal Purpose Plan | 2 pm  | Amy Vetter                                | Personal Development                             | 1     |
|           | Auditing (Governmental)                                              |       |                                           |                                                |       |
| Dec 5, 2022 | Obtaining and Understanding Your Client’s IRS Account Information     | 11 am | Jim Buttonow                              | Taxes                                           | 2     |
| Dec 6, 2022 | 2022 Form 1099 Filing Update                                          | 11 am | Steven Mercatante                         | Taxes                                           | 2     |
| Dec 6, 2022 | 2022 Year-End Tax Update for Not-for-Profits                          | 2 pm  | Clark Nuber, Sara Elizabeth Jones, Megan Ryan, James Hamill | Taxes                                           | 2     |
| Dec 6, 2022 | S Corporation Taxation Concepts and Planning Strategies: Part 1 (Half-Day Webinar) | 10 am | James Hamill                              | Taxes                                           | 4     |
| Dec 7, 2022 | 2022 Tax Updates for Businesses                                       | 10 am | Barbara Weltman                           | Taxes                                           | 1     |
| Dec 7, 2022 | Making Your Client More Appealing: Taking the Client’s Case to Appeals | 2 pm  | Eric Green                                | Taxes                                           | 2     |
| Dec 7, 2022 | Reporting in a Single Audit                                           | 11 am | Diane Edelstein                           | Auditing (Governmental)                         | 2     |
| Dec 8, 2022 | Introduction to Business Intelligence (BI)                            | 2 pm  | Lynn Fountain                             | Auditing                                        | 2     |
| Dec 8, 2022 | Preparing Form 1065: Part 1 (Half-Day Webinar)                        | 10 am | Greg White                                | Taxes                                           | 4     |
| Dec 8, 2022 | Tackling Excel's Table Feature                                        | 11 am | David Ringstrom                           | Computer Software & Applications                | 2     |
| Dec 9, 2022 | Corporate Tax: Formation and Operation                                | 2 pm  | Jennifer Kowal                            | Taxes                                           | 2     |
| Dec 9, 2022 | Preparing Form 1065: Part 2 (Half-Day Webinar)                        | 10 am | Greg White                                | Taxes                                           | 4     |
| Dec 9, 2022 | Preparing U.S. Personal Tax Returns for Cross Border Persons: Common Tax Issues | 11 am | Patrick McCormick                        | Taxes                                           | 2     |
| Dec 12, 2022 | 2022 Business Tax Practice Update                                    | 11 am | Jennifer Kowal                            | Taxes                                           | 2     |
| Dec 12, 2022 | 2022 Leases Update                                                    | 2 pm  | Pat Patterson                             | Accounting, Auditing                            | 2     |
| Dec 12, 2022 | How to Account and Audit for Digital Assets                           | 9 am  | Salvatore Collemi                         | Accounting                                     | 2     |
| Dec 12, 2022 | S Corporation Taxation Concepts and Planning Strategies: Part 2 (Half-Day Webinar) | 10 am | James Hamill                              | Taxes                                           | 4     |
| Dec 13, 2022 | 2022 Estate & Financial Planning Quarterly Update (Fall)             | 11 am | Klaralee Charlton                        | Taxes                                           | 2     |
| Dec 13, 2022 | 2022 GAAP Update                                                      | 2 pm  | Lewis Fisher                              | Accounting                                     | 2     |
| Dec 13, 2022 | Master the Latest IRS Standards for Tax Practice under Circular 230    | 9 am  | Michael Goller                           | Taxes                                           | 2     |
| Dec 13, 2022 | Preparing Form 709: The Federal Gift Tax Return                       | 2 pm  | Steven Siegel                             | Taxes                                           | 2     |
| Dec 14, 2022 | 2022 Tax Updates for Individuals                                      | 1 pm  | Barbara Weltman                           | Taxes (1 hour)                                 | 1     |
| Dec 14, 2022 | Recognizing Accounting Method Changes and Effects                    | 2 pm  | Jennifer Kowal                            | Taxes                                           | 2     |
| Dec 14, 2022 | State and Local Reporting: 1099 and SALT Issues                      | 11 am | Steven Mercatante                         | Taxes                                           | 2     |
| Dec 15, 2022 | 2022 Individual Planning and Due Diligence (Half-Day Webinar)        | 10 am | Annette Nellen                           | Taxes                                           | 4     |
| Dec 15, 2022 | Developing a Digital Mindset                                          | 11 am | Cory Campbell                             | Information Technology                          | 2     |
| Dec 15, 2022 | Fixed Asset Accounting                                                | 2 pm  | Robert Minniti                            | Accounting                                     | 2     |
| Dec 16, 2022 | FATCA: How to Comply with Minimal Withholding, Tax, & Penalty Impact  | 2 pm  | Miles Hutchinson                         | Taxes                                           | 2     |
| Dec 16, 2022 | Sale of Closely Held Businesses (Half-Day Webinar)                    | 10 am | Jennifer Kowal                            | Taxes                                           | 4     |
| Dec 19, 2022 | 2022 Accounting & Auditing End of the Year Tune-Up                   | 2 pm  | Pat Patterson                             | Accounting                                     | 2     |
| Dec 19, 2022 | How to Properly Perform an Agreed-Upon Procedures Engagement          | 9 am  | Salvatore Collemi                         | Auditing                                       | 2     |
| Dec 19, 2022 | Schedule K-2 and K-3 Update                                           | 11 am | Patrick McCormick                         | Taxes                                           | 2     |
| Dec 20, 2022 | 2022 Individual Tax Update (Full-Day Webinar)                        | 9 am  | Bradley Burnett                           | Taxes                                           | 8     |
| Date          | Event Title                                                   | Time  | Speaker(s)                          | Category(S)                        | Credits |
|---------------|--------------------------------------------------------------|-------|-------------------------------------|------------------------------------|---------|
| Dec 20, 2022  | Electronic Data Analysis                                      | 11 am | Robert Minniti                      | Auditing (2 hours)                 | 2       |
| Dec 20, 2022  | The Uses of Trusts and their Tax Consequences (Full-Day Webinar) | 9 am  | Steven Siegel                       | Taxes (8 hours)                    | 8       |
| Dec 21, 2022  | 2022 Business Tax Update (Full-Day Webinar)                 | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Dec 21, 2022  | CPA's Guidebook for Ethical Behavior: Code of Professional Conduct | 2 pm  | Allison McLeod                      | Regulatory Ethics (2 hours)        | 2       |
| Dec 21, 2022  | Monthly Tax Update (December)                                | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Dec 22, 2022  | Advanced Partnership Taxation Concepts (Half-Day Webinar)    | 10 am | Greg White                          | Taxes (4 hours)                    | 4       |
| Dec 22, 2022  | Excel Nuances                                                | 11 am | David Ringstrom                     | Computer Software & Applications (2 hours) | 2       |
| Dec 22, 2022  | Mastering Adobe Acrobat for Financial Professionals           | 2 pm  | Stephen Yoss                        | Computer Software & Applications (2 hours) | 2       |
| Dec 23, 2022  | 2022 Federal Tax Update (Full-Day Webinar)                  | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Dec 23, 2022  | Regulatory Ethics Guidebook for CPAs: AICPA Code of Professional Conduct (Half-Day Webinar) | 10 am | Allison McLeod                      | Regulatory Ethics (4 hours)        | 4       |
| Dec 27, 2022  | 2022 C Corporations Update                                  | 11 am | Bradley Burnett                     | Taxes (2 hours)                    | 2       |
| Dec 27, 2022  | 2022 FASB Developments                                      | 2 pm  | Pat Patterson                       | Accounting (2 hours)               | 2       |
| Dec 28, 2022  | Hot Tax Topics at Year End for 2022                         | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Dec 28, 2022  | Preparing Form 706: The Federal Estate Tax Return            | 2 pm  | Steven Siegel                       | Taxes (2 hours)                    | 2       |
| Dec 29, 2022  | 2022 Accounting and Auditing Update (Full-Day Webinar)      | 9 am  | Pat Patterson                       | Accounting (4 hours), Auditing (4 hours) | 8       |
| Jan 1, 2023   | Highlights of the Inflation Reduction Act                   | 1 pm  | Annette Nellen                      | Taxes (1 hour)                     | 1       |
| Jan 4, 2023   | How to Help Your Clients Claim Energy Credits Over the Next 10 Years | 12 pm | Annette Nellen                      | Taxes (1 hour)                     | 1       |
| Jan 10, 2023  | 2022 Tax Updates for Businesses                             | 10 am | Barbara Weltman                     | Taxes (1 hour)                     | 1       |
| Jan 10, 2023  | Worker Classification: Dealing with Current Rules and What Might Lie Ahead | 2 pm  | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Jan 11, 2023  | 2022 Individual Tax Update (Full-Day Webinar)               | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Jan 12, 2023  | 2022 Business Tax Update (Full-Day Webinar)                 | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Jan 17, 2023  | 2022 Tax Updates for Individuals                            | 10 am | Barbara Weltman                     | Taxes (1 hour)                     | 1       |
| Jan 18, 2023  | 2022 Federal Tax Update (Full-Day Webinar)                  | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Jan 24, 2023  | 2022 Form 990PF: Tax Return Walk-thru and Overview of the Basics | 11 am | Clark Nuber                         | Taxes (2 hours)                    | 2       |
| Jan 24, 2023  | Monthly Tax Update (January)                                | 2 pm  | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Feb 8, 2023   | 2022 Individual Tax Update (Full-Day Webinar)               | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Feb 9, 2023   | 2022 Business Tax Update (Full-Day Webinar)                 | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Feb 15, 2023  | 2022 Federal Tax Update (Full-Day Webinar)                  | 9 am  | Bradley Burnett                     | Taxes (8 hours)                    | 8       |
| Feb 16, 2023  | Cryptocurrency Taxation Fundamentals and Open Issues        | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Feb 21, 2023  | 2022 Form 1065 K-1s (K-2s and K-3s)                         | 2 pm  | Bradley Burnett                     | Taxes (3 hours)                    | 3       |
| Feb 22, 2023  | Monthly Tax Update (February)                               | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Mar 9, 2023   | Monthly Tax Update (March)                                  | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Apr 19, 2023  | Strategies to Conquer the Overwhelming Complexity of Tax Laws | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Apr 28, 2023  | Monthly Tax Update (April)                                  | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| May 10, 2023  | Self Employment Tax: Today’s World of Sharing, LLCs & Tax Reform | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| May 31, 2023  | Monthly Tax Update (May)                                    | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Jun 13, 2023  | Ethics Checklist for Tax Practitioners                      | 11 am | Annette Nellen                      | Regulatory Ethics (2 hours)        | 2       |
| Jun 20, 2023  | Basics of Nexus: Understanding State Tax Issues              | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Jun 28, 2023  | Monthly Tax Update (June)                                   | 11 am | Annette Nellen                      | Taxes (2 hours)                    | 2       |
| Date       | Event Title                                                                 | Time  | Trainer     | Topic              | Duration (Hours) | Credits |
|------------|----------------------------------------------------------------------------|-------|-------------|--------------------|------------------|---------|
| Jul 25, 2023 | Monthly Tax Update (July)                                                   | 11 am | Annette Nellen | Taxes (2 hours)    | 2                |
| Aug 15, 2023 | Passive Loss Rules and Real Estate Professionals                           | 11 am | Annette Nellen | Taxes (2 hours)    | 2                |
| Aug 30, 2023 | Monthly Tax Update (August)                                                 | 11 am | Annette Nellen | Taxes (2 hours)    | 2                |
| Sep 27, 2023 | Monthly Tax Update (September)                                             | 11 am | Annette Nellen | Taxes (2 hours)    | 2                |
| Oct 19, 2023 | Tax Updates for 2023 Individual Planning and Due Diligence (Half-Day Webinar) | 10 am | Allison McLeod | Taxes (4 hours)    | 4                |