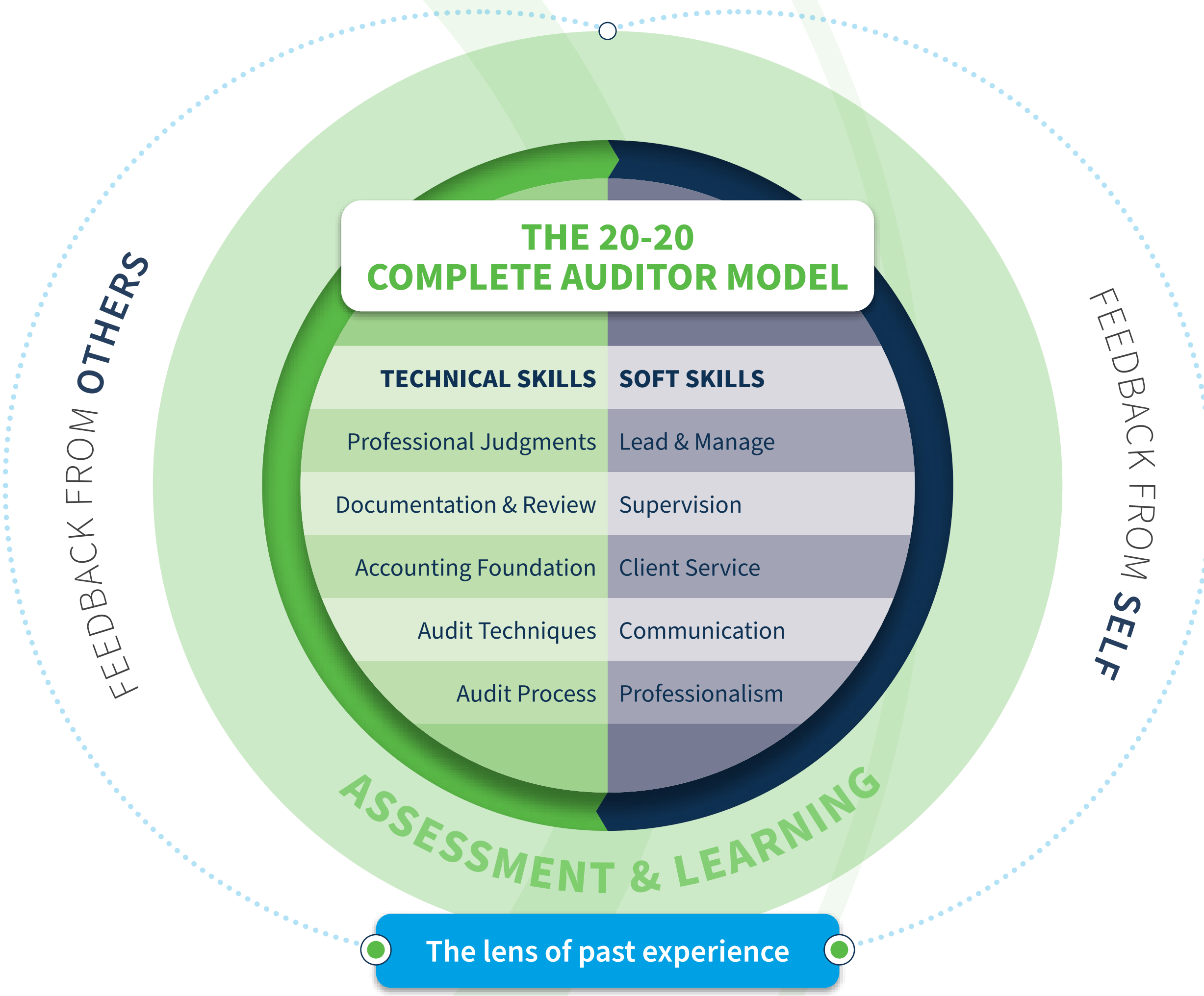
The 20-20 Complete Auditor Model



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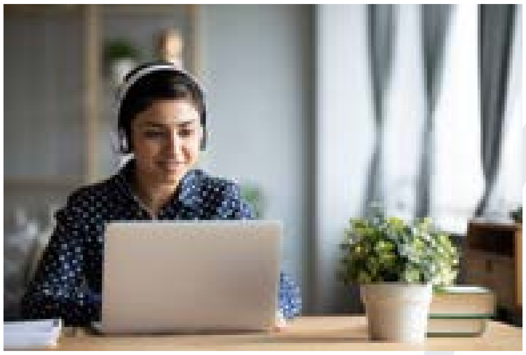
20-20 Services provides a complete audit training curriculum to help develop your staff into well-rounded professionals who can take your firm to the next level. We have identified the key skill sets needed at various phases of a public accounting career and incorporated them into comprehensive training programs that offer both technical and soft-skills training. Our courses are tailored so that each module provides an opportunity to apply new skills right away. We use our experience in adult learning to design courses that share practical knowledge as well as engage and excite the participants. We encourage you to explore our unique offerings and ask us more about our training programs.

LEVEL ONE

New Hire Training

1



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**0-1 Year Professional Exp.**
Level of Instruction	**Basic**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Auditing (AUD) – 20 Communications & Marketing (COM) – 3 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Describe the general audit process including the gathering of information, uses of risk assessments, performance of procedures, and the reporting process.
- Perform and document common basic audit procedures such as vouching, tracing, confirming, inspecting, and observing.
- Take instruction and complete common tasks and audit procedures in areas often assigned to newer associates such as cash, accounts payable, inventory, and accounts receivable.

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LEVEL ONE SUMMARY

New Hire Training is designed for individuals with limited practical experience on audits. The program provides critical skill training for new associates related to performing and documenting audit procedures. The program addresses the skills by examining and practicing audit procedures in the common audit areas assigned to newer associates. Utilization of the accounting records from a real small business creates a realistic simulation in the classroom. The program also provides training on certain key foundational skills necessary to be successful in the profession.

MODULE SUMMARY

Audit Concepts and Skills .... **9 Credits**

- Role of the New Hire (AUD 1)
- Audit Process (AUD 2)
- Risk Assessment Procedures & Walkthroughs (AUD 2)
- Audit Procedures (AUD 2)
- Preparing Audit Documentation (AUD 2)

Audit Case Study .... **11 Credits**

- Cash (AUD 3)
- Accounts Receivable (AUD 2)
- Inventory Observations (AUD 2)
- Property, Plant & Equipment (AUD 2)
- Accounts Payable (AUD 2)

Professional Skills .... **4 Credits**

- Listening Skills (COM 2)
- Professionalism (PD 1)
- Business Writing Fundamentals (COM 1)

"Include your firm's auditing forms in this course at no additional cost! Contact us to discuss."

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20·20 AUDIT TRAINING

LEVEL TWO

Staff Training

2

LEVEL TWO SUMMARY

Staff Training is designed for staff accountants with one busy season of experience. This program includes significant content targeted for tasks and procedures performed by the more experienced staff person on the engagement. Topics include updating internal control documentation, performing walkthroughs, sampling techniques, valuation testing for accounts receivable and data analytics. In addition, the program provides skill training on select key foundational skills necessary for success in the public accounting profession.

MODULE SUMMARY

Audit Knowledge and Skills .... **15 Credits**

- Role of Audit Staff (AUD 1)
- Risk Based Auditing (AUD 1)
- Audit Process (AUD 2)
- Understanding the Entity (AUD 2)
- Understanding and Documenting Internal Controls (AUD 2)
- Beyond the Basics (AUD 1)
- Fraud (AUD 2)
- Substantive Analytical Procedures (AUD 2)
- Substantive Sampling (AUD 2)

Specialized Accounting and Auditing Topics .... **7 Credits**

- Accounts Receivable (AUD 2)
- Auditing Inventory (AUD 1, ACCT 1)
- Introduction to Data Analytics in the Audit (AUD 3)

Professional Skills .... **2 Credits**

- Performing Effective Inquiries (COM 1/AUD 1)

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MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**6-18 Mos. Professional Exp.**
Level of Instruction	**Basic**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Auditing (AUD) – 22 Accounting (ACCT) – 1 Communications & Marketing (COM) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Apply basic risk assessment procedures, including updating and validating cycle level control documentation and entity understanding.
- Effectively perform basic audit procedures such as analytical procedures, sampling and fraud procedures, and address specific areas such as valuation of receivables, accounting for leases, and revenue.
- Gather and share information with the client and audit team, and demonstrate appropriate and ethical decision making.

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LEVEL THREE

New In-Charge Training

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**2+ Yrs. Professional Exp.**
Level of Instruction	**Intermediate**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Auditing (AUD) – 16.5 Accounting (ACCT) – 2 Personal Development (PD) – 3.5 Management Services (MS) – 2	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Supervise, complete, or contribute to all required risk assessment procedures.
- Evaluate the design effectiveness of a client's activity level controls.
- Design, perform, and supervise the performance of key audit procedures, tests of controls and analytical procedures, including appropriate use of data extraction software.
- Manage audit fieldwork, including organizing the project and supervising team members.

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LEVEL THREE SUMMARY

New In-Charge Training is designed for individuals transitioning to the role of Senior or In-Charge on the audit engagement team. This program includes significant content on the audit process, data analytics, project management, supervision, and file review to prepare the participant for in-field leadership responsibilities. The program includes significant technical content related to evaluating activity level controls, assessing and responding to risk and performing tests of controls. This program will challenge participants to put the audit process together and step into a more advanced role on the audit team.

MODULE SUMMARY

Audit Knowledge and Skills .... **13 Credits**

- Role of the In-Charge (AUD 1)
- Audit Process & Understanding the Entity (AUD 1.5)
- Evaluating Activity Level Controls (AUD 2)
- Risk Assessment (AUD 1.5)
- Responding to Risk (AUD 1)
- Control Testing (AUD 1.5)
- Developing Expectations for Analytical Procedures (AUD 2)
- Reviewing Audit Documentation (AUD 2.5)

Specialized Accounting and Auditing Topics .... **3.5 Credits**

- Contemporary Audit Techniques - Database and Structured Data (AUD 1.5)
- ASC 606: Revenue Recognition Issues (ACCT 2)

Professional Skills .... **7.5 Credits**

- Project Management (MS 2)
- Supervision Styles & Providing Feedback (AUD 2)
- Time Management & Organization (PD 2)
- Teaching & Delegating (PD 1.5)

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LEVEL FOUR

Experienced In-Charge Training

4

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**3+ Yrs. Professional Exp.**
Level of Instruction	**Intermediate**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Auditing (AUD) – 17 Communications & Marketing (COM) – 6 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Evaluate the design effectiveness of a client's entity level and technology controls.
- Design custom audit programs to respond to assessed risks.
- Address challenging accounting and auditing issues in areas such as revenue recognition, accounting estimates.
- Assess self and other individuals' motivation and personal style for leading and communicating.
- Practice delivering a business presentation.

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LEVEL FOUR SUMMARY

Experienced In-Charge Training is designed for individuals with experience as the in-field leader. The program is designed to advance the skills and effectiveness of participants. The program addresses more advanced audit process steps, such as evaluating management, and setting and responding to financial statement level risks, including those created from a lack of entity level controls. The program challenges participants to create custom responses to the risks on their engagements. The program provides a variety of training related to technical accounting and auditing topics. In addition, the program provides robust research based content related to supervising for effective and efficient performance.

MODULE SUMMARY

Audit Knowledge and Skills .... **13.5 Credits**

- Role of the Senior & Professional Skepticism (AUD 1.5)
- Planning for Efficient, Quality Audits (AUD 2)
- Case Study in Risk Assessment (AUD 4)
- General Technology Controls (AUD 2)
- Auditing Estimates (AUD 2)
- Changes to Audit Reporting (AUD 2)

Specialized Accounting and Auditing Topics .... **1.5 Credits**

- Contemporary Audit Techniques - Data Acquisition (AUD1.5)

Professional Skills .... **9 Credits**

- Business Writing for Auditors (COM 2)
- Supervising & Motivating Team Members (AUD 2)
- Communicating Within and Across Teams (COM 2)
- Creating Business Presentations (COM 2)
- Mentoring for the Future (PD 1)

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MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Yrs. Professional Exp.**
Level of Instruction	**Intermediate**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Accounting (ACCT) – 2 Auditing (AUD) – 11.5 Personal Development (PD) – 2.5	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Design efficient and effective audit programs to respond to identified risks.
- Address challenging auditing issues in areas such as fair value, interim procedures, and internal control testing.
- Increase effectiveness of interactions with clients and the team through consideration of conflict management and supervisory approaches.
- Describe and apply key concepts in ASC Topic 842.

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LEVEL FIVE

Supervisor Training

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LEVEL FIVE SUMMARY

Supervisor Training is designed to advance the skills of experienced in-field auditors and begins the development of management level skills. This two-day program provides training in audit technical areas, as well as foundational skills essential for leading teams. The blend of skills and technical topics makes this a valuable program for continued growth in the profession.

MODULE SUMMARY

Audit Knowledge and Skills .... **6 Credits**

- Role of the Supervisor (AUD 1)
- Designing Risk-Based Audit Procedures (AUD 2)
- Interim Procedures, Including Internal Control Testing (AUD 2)
- Auditing Fair Value & Using the Work of a Specialist (AUD 1)

Specialized Accounting and Auditing Topics .... **5.5 Credits**

- Case Study in Accounting for Leases (ACCT 2)
- Digital Strategy for Audit Leadership (AUD 2)
- Contemporary Audit Techniques - Alternatives to Sampling (AUD 1.5)

Professional Skills .... **4.5 Credits**

- Providing Written & Verbal Feedback (AUD 2)
- Conflict Management (PD 1.5)
- Creative Problem Solving (PD 1)

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LEVEL SIX

Manager Training

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**5+ Yrs. Professional Exp.**
Level of Instruction	**Intermediate**
Delivery Method	**Group Live** **Group Internet** **Blended Learning**
CPE Credits Auditing (AUD) – 8 Personal Development (PD) – 6 Management Services (MS) – 2	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Perform managerial roles on audit engagements, including identifying quality issues, job specific project management, and managing multiple over-lapping projects.
- Analyze and report to the client all required information, including addressing financial misstatements and control deficiencies.

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LEVEL SIX SUMMARY

Manager Training is designed for individuals who have recently transitioned or are preparing to transition to a managerial role. This two-day program contains technical auditing topics, with a focus on communicating findings and issues with the client, reviewing recent inspection report findings and data analytics. The program also contains content related to key foundational skills necessary to function as a manager within the public accounting profession.

MODULE SUMMARY

Audit Knowledge and Skills .... 6 Credits

- Role of the Manager (AUD 1)
- The Manager Review (AUD 1)
- Learning from Inspection Reports (AUD 2)
- Impact of Technology in Accounting and Auditing (AUD 2)

Evaluating & Communicating Results .... 2 Credits

- Results of Substantive Audit Procedures (AUD 1)
- Uncorrected Misstatements & Control Deficiencies (AUD 1)

Professional Skills .... 8 Credits

- Time Management and Organization (PD 2)
- Leadership and Management (PD 2)
- Project Management (MS 2)
- Business Development (PD 2)

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Experienced Manager Program

MODULE INFORMATION

Prerequisite	**1+ Yrs. Management Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Communication & Marketing (COM) – 9.5 Personal Development (PD) – 10.5	**20 Credits**
Advance Preparation **Bring a presentation for delivery during the program**	

LEARNING OBJECTIVES

- Describe strategic activities to grow a professional network, including key people within your firm, and existingand potential clients.
- List and apply best practices for making successful presentations in a business setting.
- Analyze and practice best approaches to tackle difficult conversations with clients and team members.
- Demonstrate leadership skills by identifying and recognizing biases, building trust within your team, listing strategies to motivate the individuals on your engagement teams, and prioritizing the professional development of staff.

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EXPERIENCED MANAGER PROGRAM (EMP) SUMMARY

The EMP is designed for individuals who have 2+ years of experience in the manager role in client service. This 2.5 day program will explore the skills necessary for seasoned managers to develop into future leaders of the organization. The EMP provides a deep dive on the topics relating to leading teams, crucial conversations, business development, and a heavy emphasis on business presentation skills. Participants will have an opportunity to explore and build upon their strengths, and to identify strategies to work through challenges.

MODULE SUMMARY

Introduction, Goal Setting and Review..(PD 1.5)
- Identify challenges facing experienced managers
- List goals for implementing strategies discussed in the program
- Review concepts discussed in the program and set action plans

Successful Communication.. (COM 3.5)
- Analyze three components of successful communication; intentional communication, active listening skills and the role of non-verbal communication
- Analyze differences between electronic and in-person communications and how to become more effective at both
- Practice opportunities to implement the components of successful communication

Team Development and Feedback ....(PD 3)
- Analyze internal and external motivational factors and explore the impact of a team leader on the motivation of individual team members
- Describe best practices to conduct effective development conversations
- Examine strategies to better develop engagement team members
- List elements of the feedback model
- Review concept of feed-forward

Building an Intentional Network ....(PD 2)
- Delve into steps to take to begin conversations that lead to winning new business
- Explore network building strategies with key people at your firm and external contacts

Managing Energy & Stress ....(PD 2)
- Identifying impacts on your own energy as well as energy of your team members
- Brainstorm strategies for managing mindset, energy and activities to improve performance and satisfaction
- Support team members through stressful times

Business Presentation Skills .... (COM 6)
- List essential skills for exceptional virtual presenters
- Identify best-practices for setting up your virtual presentation studio
- List common tools for creating engagement and collaboration in your virtual presentations
- Practice delivering business presentations in a variety of settings

Building Trust ....(PD 2)
- List dimensions of diversity in self and others
- Define concpets related to diversity and inclusion as relevant to the workplace
- Review strategies to build trust within your teams

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20-20 Services LLC | 2022 Pricing

DELIVERY METHOD:	PEAK SEASON May 1st - August 15th, 2022 & October 15th - January 15th, 2023 STANDARD | BLENDED	CUSTOMIZED	NON PEAK SEASON January 16th - April 30th, 2022 & August 16th - October 14th, 2022 STANDARD | BLENDED	CUSTOMIZED
Group Live* Additional Participants > 24 Out of Pocket Instructor Expenses	\$470 | \$480 \$15 | \$25 + Instructor Expenses	\$500 \$15	\$425 | \$435 \$15 | \$25 + Instructor Expenses	\$455 \$15
Virtual Classroom** Additional Participants > 24	\$495 \$25 | \$35	\$545 \$25	\$450 \$25 | \$35	\$480 \$25
Course Materials:				
Audit: 24 CPE credit programs: 16 CPE credit programs:	\$50 pp \$35 pp	\$50 pp \$35 pp	\$50 pp \$35 pp	\$50 pp \$35 pp
Tax & AST: 24 CPE credit programs: 16 CPE credit programs:	\$120 pp \$80 pp	\$120 pp \$80 pp	\$120 pp \$80 pp	\$120 pp \$80 pp

Pricing shown above is per CPE credit hour delivered. Refer to examples below.
*Firm serves as CPE Sponsor, unless Blended Learning is delivered. 20-20 can serve as CPE Sponsor for an additional fee.
**20-20 is CPE Sponsor. Price includes virtual classroom platform, attendance monitoring and CPE processing.

Peak Season Example No. 1: Standard Tax Level 2, 24 CPE credit hours, 20 participants – Group Live

24 CPE credit hours x \$470 =	\$11,280
Course Materials: \$120 x 20 =	\$2,400
Total:	\$13,680

+ Out of Pocket Travel Expenses (Airfare, Lodging, Meals, etc.)

Peak Season Example No. 2: Customized Audit Level 3, 24 CPE credit hours, 28 participants – Virtual Delivery

24 CPE credit hours x \$545 =	\$13,080
Additional Participants: (\$25 x 24)*4 =	\$2,400
Course Materials: \$50 x 28 =	\$1,400
Total:	\$16,880

Non Peak Season Example No. 3: Standard Audit Level 4, 15 participants – Virtual Delivery

24 CPE credit hours x \$450 =	\$10,800
Course Materials: \$50 x 15 =	\$750
Total:	\$11,550

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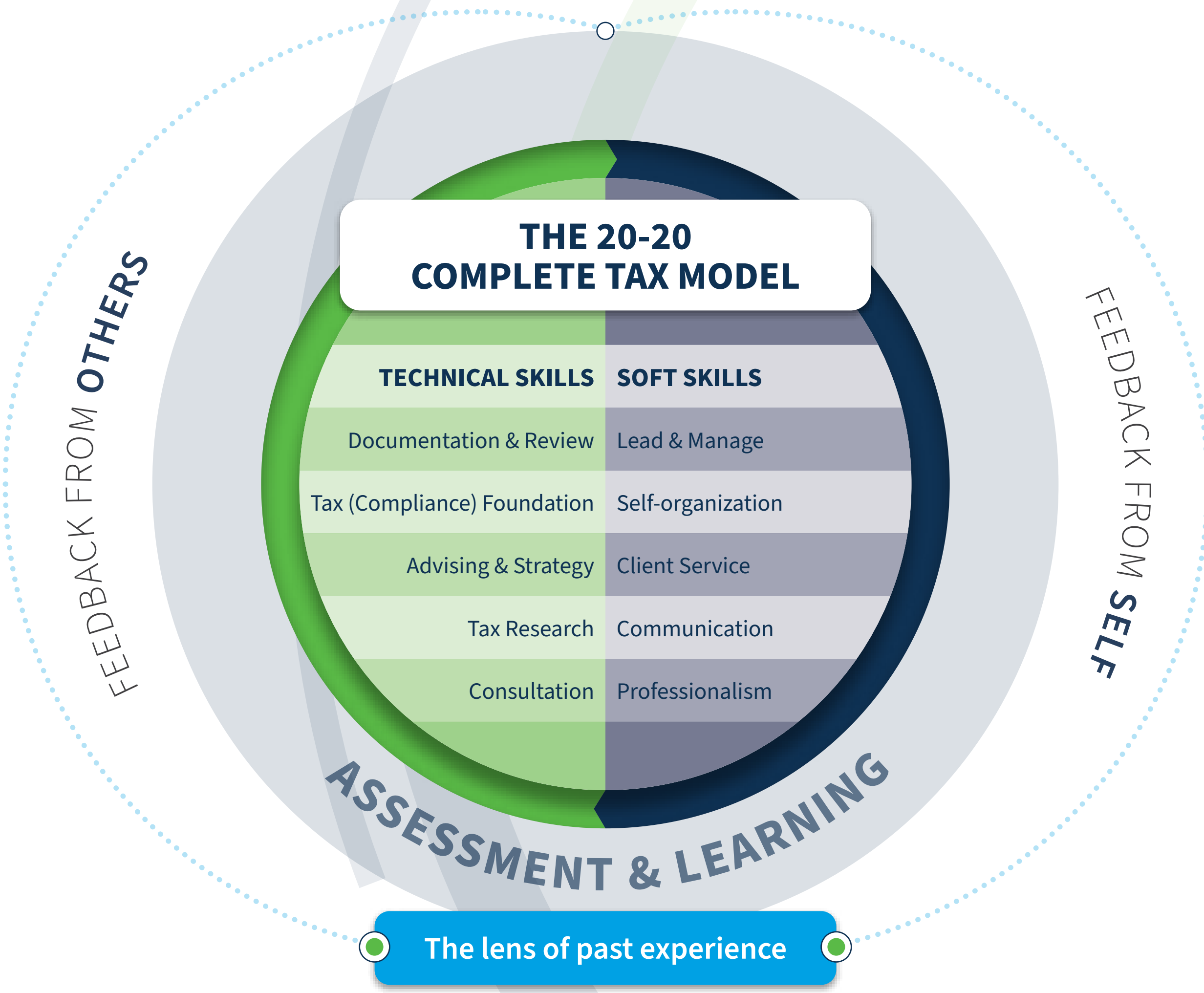
The 20-20 Complete Tax Model



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1

Level One

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**None**
Level of Instruction	**Basic**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 23 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Identify the tax rules related to the common types of income, deductions, and credits found on the Form 1040.
- Discuss appropriate professional behavior, as well as various communication techniques, including the basics of oral and e-mail correspondence.
- Learn to prepare an individual tax return.
- Introduce business tax topics, such as Sch K, Sch M-1 and depreciation.
- Learn to prepare an S Corporation Tax Return or a C Corporation Tax Return.

LEVEL ONE SUMMARY

Level One is designed for individuals who are beginning their career. It provides practical training for each of the important areas a new tax preparer would encounter when preparing tax returns. The program also provides personal skills training related to professionalism and etiquette. This interactive program includes the preparation of an individual tax return, as well as an S Corporation tax return, using real life source documents.

MODULE SUMMARY

Individual Tax Return .... **12 Credits**

- Filing Status & Dependency
- Compensation
- Interest & Dividends
- Capital Gains & Losses
- Self-Employment
- Residential Rental Properties
- Adjustments to Income
- Standard & Itemized Deductions
- Individual Tax Credits
- Documentation

Prepare an Individual Tax Return .... **3 Credits**

Foundational Skills .... **1 Credit**

- Professionalism

Business Tax Topics .... **5 Credits**

- Introduction to Business Taxes
- Schedules K & M-1
- Depreciation

Prepare an S Corporation Tax Return .... **3 Credits**

Prepare a C Corporation Tax Return .... **(Optional Upon Request)**

The course material utilizes case studies pulled from current, real life tax scenarios.

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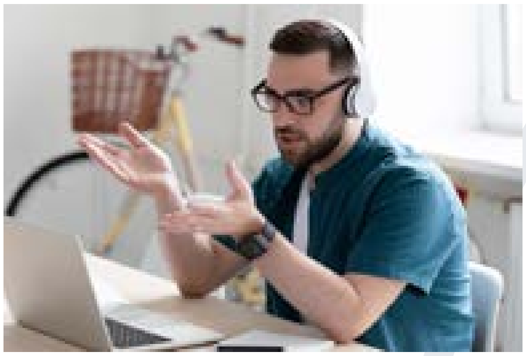
Level Two



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**1+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 22 Communications & Marketing – 1 Personal Development (PD) – 1	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Identify the fundamental tax laws governing C Corporations, S Corporations, Limited Liability Companies, and Partnerships.
- Calculate permanent differences, timing differences, taxable income, separately stated items, and ordinary income.
- Review the tax principles of other business topics such as basis, depreciation, and state apportionments.
- Explain the tax treatment of selected individual income tax topics.
- Explore selected tax principles for rental property and self-employment income.
- Compute alternative minimum tax adjustments and preferences.
- Improve communication, business writing, and organizational skills.

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LEVEL TWO SUMMARY

Level Two is designed for staff tax preparers. The program covers both individual and business tax subjects. It focuses on delivering a core understanding of the common tax topics that tax preparers encounter every day. The business tax section of the program covers the fundamental tax laws for each type of business entity, as well as other topics, such as book to tax reconciliation, basis, and depreciation. The program also provides skills training related to communication, obtaining and organizing information, and time management. This program includes extension case study exercises and tax court case review.

MODULE SUMMARY

Business Tax Topics .... **16 Credits**

- C Corporations
- S Corporations
- Introduction to LLCs and Partnerships
- Schedules K & M-1
- Basis Fundamentals – S Corporation
- Depreciation
- State Apportionments

Individual Tax Topics .... **6 Credits**

- Adjustments to Income
- Selected Sch C & Rental Property Topics
- Alternative Minimum Taxes

Foundational Skills .... **2 Credits**

- Communication – Business Writing
- Self-Management & Organization

The course material utilizes case studies pulled from current, real life tax scenarios.

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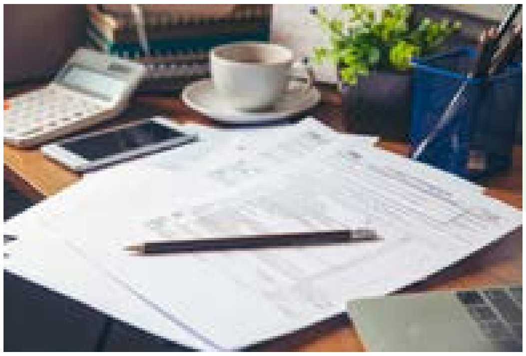
Level Three



MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**3+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 21 Communications & Marketing – 1 Personal Development (PD) – 2	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Discuss the advantages and disadvantages of the various types of business entities in order to advise on business creation.
- Review the principles of selected core business income tax topics.
- Explain the tax treatment of selected individual income tax topics.
- Identify the basics of estate/trust taxation as well as gift tax law.
- Improve on tax return review techniques and learn to provide effective and constructive feedback.
- Manage information, clients, and projects more efficiently.

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LEVEL THREE SUMMARY

Level Three is designed for individuals that are beginning the transition from tax preparer to tax reviewer and advisor. The program covers individual and business tax themes, as well as an introduction to estate and trust tax law. This course is designed to challenge the participants core tax knowledge needed to become a tax reviewer. The program also provides skills training designed for those juggling the role of preparer and reviewer.

MODULE SUMMARY

Business Tax Topics .... **14 Credits**

- Advising on Business Creation
- Built in Gains
- Basis
- Deferred Taxes
- Passive Activities & At Risk Rules
- Section 461 All Events Test

Individual Tax Topics .... **4 Credits**

- Retirement Contributions & Distributions
- Equity Based Compensation

Estates, Trusts, & Gift Taxes .... **2 Credits**

- Intro to Estates, Trusts, & Gifts Taxes

Foundational Skills .... **4 Credits**

- Reviewing Tax Returns
- Providing Feedback
- Project Planning
- Time Management

The course material utilizes case studies pulled from current, real life tax scenarios.

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20·20 TAX TRAINING

4

Level Four

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live** **Blended Learning**
CPE Credits Taxes – 21 Personal Development (PD) – 3	**24 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Explore the core limited liability company and partnership tax issues.
- Explore other advanced business income tax topics such as state tax nexus, various tax elections, and business sales and exchanges.
- Review laws governing foreign taxes, cancellation of debt.
- Brainstorm tax planning strategies.
- Discuss estate and trust taxation, and multi-generational gifting strategies.
- Apply professional skills of supervision, networking, and work life balance.

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LEVEL FOUR SUMMARY

Level Four is designed to advance the skills and knowledge of participants. This program covers individual and business topics, such as foreign taxes, and state nexus. Significant portions of the course focus on LLC and Partnership taxes, business sales and exchanges, as well as estate, gift, and trust tax law. The program also provides professional skills training focused on managing, supervising, training, and delegating.

MODULE SUMMARY

Business Tax Topics .... **11 Credits**

- LLC and Partnership Tax Issues
  - Basis and At-Risk
  - Capital Accounts
  - Partner Distributions
  - Partner Contributions
- Various Tax Elections
- State Tax Nexus
- Equity vs Asset Sales & Exchanges

Individual Tax Topics .... **6 Credits**

- Foreign Taxes
- Tax Planning
- Cancellation of Debt

Estates & Trusts .... **4 Credits**

- Estate Tax Law
- Types of Trusts
- Gift Taxes

Foundational Skills .... **3 Credits**

- Supervising, Training, and Delegating
- Work Life Balance
- Meeting People & Networking

The course material utilizes case studies pulled from current, real life tax scenarios.

NATIONAL REGISTRY OF CPE SPONSORS

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New Manager Program

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Communication – 2 Personal Development (PD) – 14	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Describe and apply multiple strategies and techniques for improving management and leadership.
- Select and apply strategies to motivate team members.
- Increase effectiveness of interactions with clients and co-workers through consideration of conflict management and supervisory approaches.
- Describe strategies to plan and coordinate multiple overlapping projects and improve project efficiency and effectiveness.
- Prioritize task completion based on importance as well as urgency.
- Provide reinforcing, developing, or constructive feedback to team members using a proven feedback model.
- Describe strategic activities to grow a professional network, including key people within your firm, and existing and potential clients.

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NEW MANAGER SUMMARY

This course is designed to begin the development of management level skills. The ideal candidate to take this program is an experienced senior tax accountant.

This 16 CPE credit hour program is entirely devoted to the skills essential to becoming a supervisor or new manager and effective future leader in a public accounting firm. Participants will have an opportunity to practice vital leadership, communication and organization strategies.

MODULE SUMMARY

- Leadership & Management
- Supervising and Motivating
- Provide Written and Verbal Feedback
- Conflict Management
- Creative Problem Solving
- Project Management
- Time Management
- Business Development & Networking

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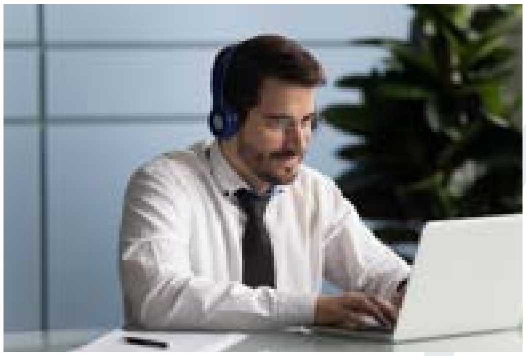
BOOTCAMP:
LLCs and Partnerships



This program is designed to immerse the participants in the many details of LLC and Partnership tax law. The material covers the range from big picture concepts to detailed specific nuances. The interactive approach includes lecture, and group activities, as well as comprehensive case studies.

THE TOPICS INCLUDE:

- Introduction to LLCs and Partnerships
- Basis and At-Risk
- Passive Activities & At Risk Rules
- Partner Distributions
- Partner Contributions
- Capital Accounts
- Payments to Partners
- Special Allocations and Substantial Economic Effect
- Sale of Partnership Interest
- IRC 754 Election Adjustment
- Comprehensive Case Studies

The course material utilizes case studies pulled from current, real life tax scenarios.

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**2-5 Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Taxes – 16	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Build a foundation of knowledge by discussing the core Limited Liability and Partnership tax issues.
- Explore advanced tax concepts that are encountered when preparing Limited Liability and Partnership tax returns.

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BOOTCAMP:
Estates, Gifts and Trusts

MODULE INFORMATION

Program Duration	**Variable**
Prerequisite	**4+ Years Professional Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Taxes – 16	**16 Credits**
Advanced Preparation	**None**

LEARNING OBJECTIVES

- Build an understanding of the steps and requirements when a client dies.
- Develop a foundation for the planning and information flow of asset transfers.
- Explore the use of trusts in the Estate and Probate planning arena and the income taxation issues that arise within.
- Review the tax principles of generation skipping transfers.
- Introduce the complex nature and intricate uses of grantor trusts.
- Explore the advanced tax issues encountered in asset transfers during life and at death.

This program is designed to provide the participants with an in-depth understanding of the multiple levels of taxation encountered in the area of Estates, Gifts & Trusts. The material covers a range of topics from basic planning to detailed requirements of the asset transfer process.

The interactive approach includes lecture and group activities, as well as comprehensive case studies.

THE TOPICS INCLUDE:

- Death of a Taxpayer
- Estate Taxes
- Gift Taxes
- Generation Skipping Transfer Tax
- Fiduciary Taxes
- Trust Agreements
- Types of Trusts
- Special Trusts
- Grantor Trusts
- Planning
- Comprehensive Case Studies

The course material utilizes case studies pulled from current, real life tax scenarios.

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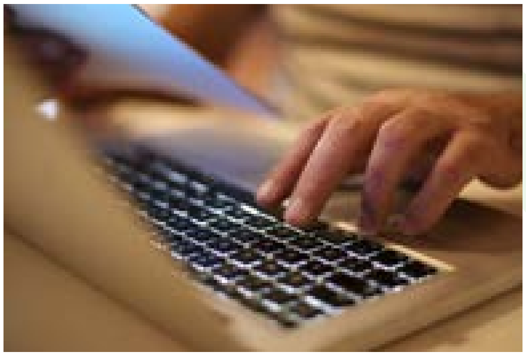
Experienced Manager Program

EXPERIENCED MANAGER PROGRAM (EMP) SUMMARY

The EMP is designed for individuals who have 2+ years of experience in the manager role in client service. This 2.5 day program will explore the skills necessary for seasoned managers to develop into future leaders of the organization. The EMP provides a deep dive on the topics relating to leading teams, crucial conversations, business development, and a heavy emphasis on business presentation skills. Participants will have an opportunity to explore and build upon their strengths, and to identify strategies to work through challenges.



MODULE INFORMATION

Prerequisite	**1+ Yrs. Management Experience**
Level of Instruction	**Intermediate**
Delivery Method	**Group Internet** **Group Live**
CPE Credits Communication & Marketing (COM) – 9.5 Personal Development (PD) – 10.5	**20 Credits**
Advanced Preparation **Bring a presentation for delivery during the program**	

LEARNING OBJECTIVES

- Describe strategic activities to grow a professional network, including key people within your firm, and existingand potential clients.
- List and apply best practices for making successful presentations in a business setting.
- Analyze and practice best approaches to tackle difficult conversations with clients and team members.
- Demonstrate leadership skills by identifying and recognizing biases, building trust within your team, listing strategies to motivate the individuals on your engagement teams, and prioritizing the professional development of staff.

V2022A

MODULE SUMMARY

Introduction, Goal Setting and Review..(PD 1.5)
- Identify challenges facing experienced managers
- List goals for implementing strategies discussed in the program
- Review concepts discussed in the program and set action plans

Successful Communication... (COM 3.5)
- Analyze three components of successful communication; intentional communication, active listening skills and the role of non-verbal communication
- Analyze differences between electronic and in-person communications and how to become more effective at both
- Practice opportunities to implement the components of successful communication

Team Development and Feedback ....(PD 3)
- Analyze internal and external motivational factors and explore the impact of a team leader on the motivation of individual team members
- Describe best practices to conduct effective development conversations
- Examine strategies to better develop engagement team members
- List elements of the feedback model
- Review concept of feed-forward

Building an Intentional Network ....(PD 2)
- Delve into steps to take to begin conversations that lead to winning new business
- Explore network building strategies with key people at your firm and external contacts

Managing Energy & Stress ....(PD 2)
- Identifying impacts on your own energy as well as energy of your team members
- Brainstorm strategies for managing mindset, energy and activities to improve performance and satisfaction
- Support team members through stressful times

Business Presentation Skills.. (COM 6)
- List essential skills for exceptional virtual presenters
- Identify best-practices for setting up your virtual presentation studio
- List common tools for creating engagement and collaboration in your virtual presentations
- Practice delivering business presentations in a variety of settings

Building Trust ....(PD 2)
- List dimensions of diversity in self and others
- Define concpets related to diversity and inclusion as relevant to the workplace
- Review strategies to build trust within your teams

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20-20 Services LLC | 2022 Pricing

DELIVERY METHOD:	PEAK SEASON May 1st - August 15th, 2022 & October 15th - January 15th, 2023 STANDARD | BLENDED	PEAK SEASON CUSTOMIZED	NON PEAK SEASON January 16th - April 30th, 2022 & August 16th - October 14th, 2022 STANDARD | BLENDED	NON PEAK SEASON CUSTOMIZED
Group Live*	$470 | $480	$500	$425 | $435	$455
Additional Participants > 24	$15 | $25	$15	$15 | $25	$15
Out of Pocket Instructor Expenses	+ Instructor Expenses		+ Instructor Expenses	
Virtual Classroom**	$495	$545	$450	$480
Additional Participants > 24	$25 | $35	$25	$25 | $35	$25
Course Materials:				
Audit:				
24 CPE credit programs:	$50 pp	$50 pp	$50 pp	$50 pp
16 CPE credit programs:	$35 pp	$35 pp	$35 pp	$35 pp
Tax & AST:				
24 CPE credit programs:	$120 pp	$120 pp	$120 pp	$120 pp
16 CPE credit programs:	$80 pp	$80 pp	$80 pp	$80 pp

Pricing shown above is per CPE credit hour delivered. Refer to examples below.
*Firm serves as CPE Sponsor, unless Blended Learning is delivered. 20-20 can serve as CPE Sponsor for an additional fee.
**20-20 is CPE Sponsor. Price includes virtual classroom platform, attendance monitoring and CPE processing.

Peak Season Example No. 1: Standard Tax Level 2, 24 CPE credit hours, 20 participants – Group Live

24 CPE credit hours x $470 =	$11,280
Course Materials: $120 x 20 =	$2,400
Total:	$13,680

+ Out of Pocket Travel Expenses (Airfare, Lodging, Meals, etc.)

Peak Season Example No. 2: Customized Audit Level 3, 24 CPE credit hours, 28 participants – Virtual Delivery

24 CPE credit hours x $545 =	$13,080
Additional Participants: ($25 x 24)*4 =	$2,400
Course Materials: $50 x 28 =	$1,400
Total:	$16,880

Non Peak Season Example No. 3: Standard Audit Level 4, 15 participants – Virtual Delivery

24 CPE credit hours x $450 =	$10,800
Course Materials: $50 x 15 =	$750
Total:	$11,550

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