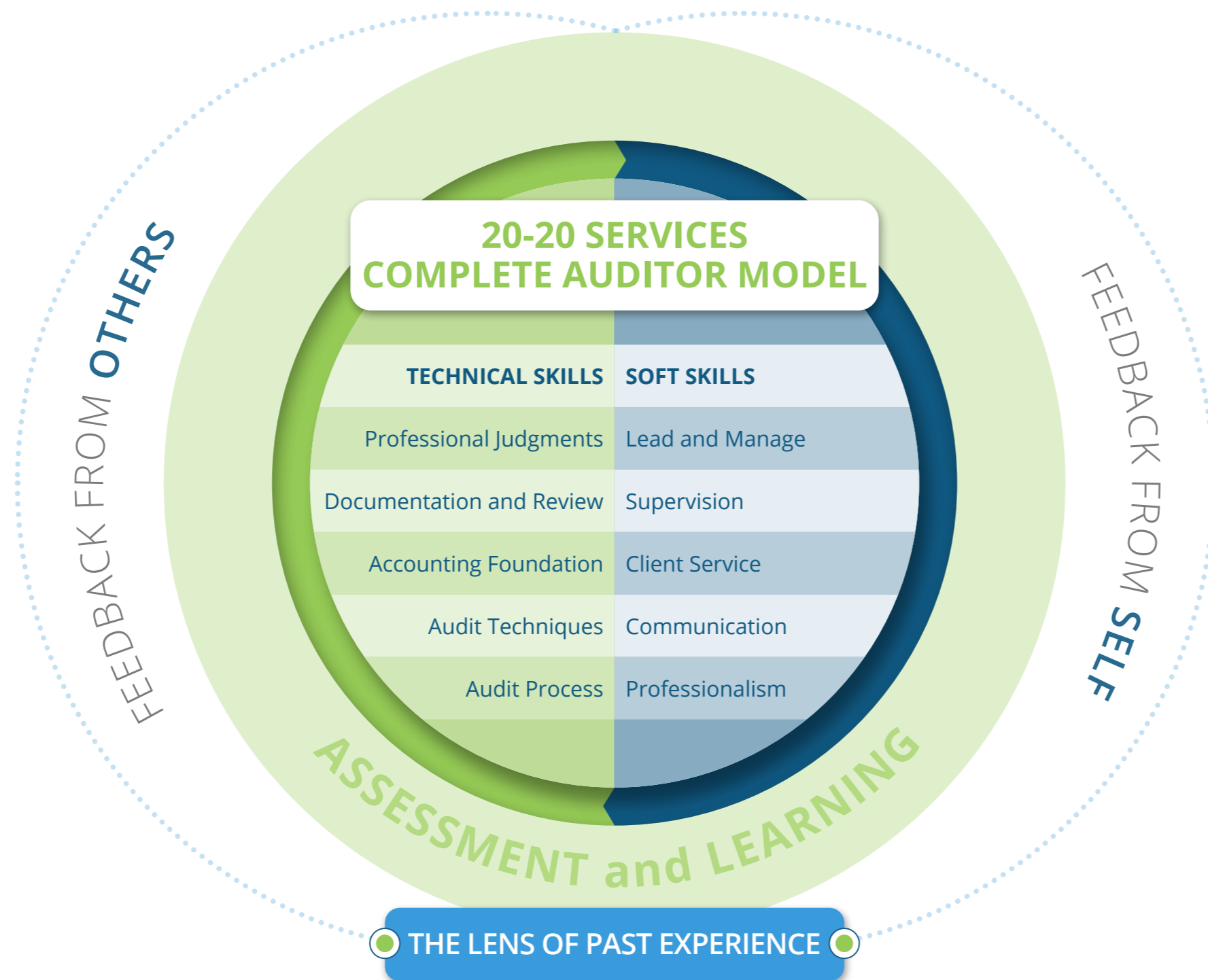




LEVEL 1 NEW HIRE TRAINING  
LEVEL 2 STAFF TRAINING  
LEVEL 3 NEW IN-CHARGE TRAINING  
LEVEL 4 EXP. IN-CHARGE TRAINING

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EXPERIENCED MANAGER PROGRAM

# Complete, High-End Audit Training Curriculum



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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.



For more information or if you have any questions, contact Beckie Reilly at 855.988.2020 or email her at



[beckie.reilly@20-20services.com](mailto:beckie.reilly@20-20services.com).



AUDIT



LEVEL 1 NEW HIRE TRAINING

LEVEL 2 STAFF TRAINING

LEVEL 3 NEW IN-CHARGE TRAINING

LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING

LEVEL 6 MANAGER TRAINING

EXPERIENCED MANAGER PROGRAM

Access topics by clicking on the circles below or navigation hyperlinks at the top of each page.



[LEVEL 1 NEW HIRE TRAINING](#)[LEVEL 2 STAFF TRAINING](#)[LEVEL 3 NEW IN-CHARGE TRAINING](#)[LEVEL 4 EXP. IN-CHARGE TRAINING](#)[LEVEL 5 SUPERVISOR TRAINING](#)[LEVEL 6 MANAGER TRAINING](#)[EXPERIENCED MANAGER PROGRAM](#)

## LEVEL 1



# AUDIT TRAINING New Hire Training

**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.

## COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>0-1 Year Professional Experience</b>
Level of Instruction	<b>Basic</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>24 Credits</b>
Auditing (AUD): 20	
Communication (COM): 3	
Professional Development (PD): 1	
Advanced Preparation	<b>None</b>

All relevant modules have been updated for SAS 145:  
*Understanding the Entity and Its Environment and  
Assessing the Risks of Material Misstatement.*

## COURSE OUTLINE

### Audit Concepts and Skills 10 Credits

- Role of the new hire (AUD 1)
- Audit process (AUD 2)
- Risk assessment procedures and walkthroughs (AUD 2)
- Audit procedures (AUD 2)
- Preparing audit documentation (AUD 2)
- Introduction to sampling (AUD 1) \*

### Audit Case Study 10 Credits

- Cash (AUD 3)
- Accounts receivable (AUD 1.5)
- Inventory observations (AUD 2)
- Property, plant and equipment (AUD 2)
- Accounts payable (AUD 2)

### Professional Skills 4 Credits

- Listening skills (COM 2)
- Professionalism (PD 1)
- Business writing fundamentals (COM 1)

\* This module can be tailored to include an overview of your firm-specific sampling form at no additional charge.

## 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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# AUDIT

[LEVEL 1 NEW HIRE TRAINING](#)[LEVEL 2 STAFF TRAINING](#)[LEVEL 3 NEW IN-CHARGE TRAINING](#)[LEVEL 4 EXP. IN-CHARGE TRAINING](#)[LEVEL 5 SUPERVISOR TRAINING](#)[LEVEL 6 MANAGER TRAINING](#)[EXPERIENCED MANAGER PROGRAM](#)

## LEVEL 2



### COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>6-18 Months Professional Experience</b>
Level of Instruction	<b>Basic</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>24 Credits</b>
Auditing (AUD):	22
Accounting (ACCT):	1
Communications and Marketing (COM):	1
Advanced Preparation	<b>None</b>

All relevant modules have been updated for SAS 145:  
*Understanding the Entity and Its Environment and  
 Assessing the Risks of Material Misstatement.*

### COURSE OUTLINE

#### 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)

### 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.





LEVEL 1 NEW HIRE TRAINING  
 LEVEL 2 STAFF TRAINING  
**LEVEL 3 NEW IN-CHARGE TRAINING**  
 LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING  
 LEVEL 6 MANAGER TRAINING  
 EXPERIENCED MANAGER PROGRAM

## LEVEL 3



### AUDIT TRAINING

## New In-Charge Training

**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.

### COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>2+ Years Professional Experience</b>
Level of Instruction	<b>Intermediate</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>24 Credits</b>
Auditing (AUD): 16.5	
Accounting (ACCT): 2	
Personal Development (PD): 3.5	
Management Services (MS): 2	
Advanced Preparation	<b>None</b>

All relevant modules have been updated for SAS 145: *Understanding the Entity and Its Environment and Assessing the Risks of Material Misstatement.*

### COURSE OUTLINE

#### Audit Knowledge and Skills

##### 13 Credits

- Role of the in-charge (AUD 1)
- Audit process and 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 and providing feedback (AUD 2)
- Time management and organization (PD 2)
- Teaching and delegating (PD 1.5)

### 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 1 NEW HIRE TRAINING  
 LEVEL 2 STAFF TRAINING  
 LEVEL 3 NEW IN-CHARGE TRAINING  
 LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING  
 LEVEL 6 MANAGER TRAINING  
 EXPERIENCED MANAGER PROGRAM

## LEVEL 4



### AUDIT TRAINING

# Experienced In-Charge Training

## COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>3+ Years Professional Experience</b>
Level of Instruction	<b>Intermediate</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>24 Credits</b>
Auditing (AUD): 17	
Communications and Marketing (COM): 6	
Personal Development (PD): 1	
Advanced Preparation	<b>None</b>

All relevant modules have been updated for SAS 145:  
*Understanding the Entity and Its Environment and  
 Assessing the Risks of Material Misstatement.*

## COURSE OUTLINE

### Audit Knowledge and Skills 13.5 Credits

- Role of the senior and 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 (AUD 1.5)

### Professional Skills 9 Credits

- Business writing for auditors (COM 2)
- Supervising and motivating team members (AUD 2)
- Communicating within and across teams (COM 2)
- Creating business presentations (COM 2)
- Mentoring for the future (PD 1)

## 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 and accounting estimates.
- Assess self and other individuals' motivation and personal style for leading and communicating.
- Practice delivering a business presentation.



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# AUDIT



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 LEVEL 2 STAFF TRAINING  
 LEVEL 3 NEW IN-CHARGE TRAINING  
 LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING  
 LEVEL 6 MANAGER TRAINING  
 EXPERIENCED MANAGER PROGRAM

## LEVEL 5



# AUDIT TRAINING Supervisor Training

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.

## COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>4+ Years Professional Experience</b>
Level of Instruction	<b>Intermediate</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>16 Credits</b>
Accounting (ACCT): 2	
Auditing (AUD): 11.5	
Personal Development (PD): 2.5	
Advanced Preparation	<b>None</b>

## COURSE OUTLINE

### 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 and 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 and verbal feedback (AUD 2)
- Conflict management (PD 1.5)
- Creative problem solving (PD 1)

## 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.

All relevant modules have been updated for SAS 145:  
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 LEVEL 2 STAFF TRAINING  
 LEVEL 3 NEW IN-CHARGE TRAINING  
 LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING  
 LEVEL 6 MANAGER TRAINING  
 EXPERIENCED MANAGER PROGRAM

## LEVEL 6



# AUDIT TRAINING Manager Training

**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.

## COURSE INFORMATION

Duration	<b>Variable</b>
Prerequisite	<b>5+ Years Professional Experience</b>
Level of Instruction	<b>Intermediate</b>
Delivery Method	<b>Group Live Group Internet Blended Learning</b>
CPE Credits	<b>16 Credits</b>
Auditing (AUD): 8 Personal Development (PD): 6 Management Services (MS): 2	
Advanced Preparation	<b>None</b>

## COURSE OUTLINE

### 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 and Communicating Results 2 Credits

- Results of substantive audit procedures (AUD 1)
- Uncorrected misstatements and 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)

## LEARNING OBJECTIVES

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

All relevant modules have been updated for SAS 145:  
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 Assessing the Risks of Material Misstatement.*



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 LEVEL 2 STAFF TRAINING  
 LEVEL 3 NEW IN-CHARGE TRAINING  
 LEVEL 4 EXP. IN-CHARGE TRAINING

LEVEL 5 SUPERVISOR TRAINING  
 LEVEL 6 MANAGER TRAINING  
 EXPERIENCED MANAGER PROGRAM

## PERSONAL DEVELOPMENT



### AUDIT TRAINING

## Experienced Manager Program

Experienced Manager Program is designed for individuals who have 1+ years of experience in the manager role in client services. 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.

### COURSE INFORMATION

Duration	Variable
Prerequisite	1+ Years Management Experience
Level of Instruction	Intermediate
Delivery Method	Group Live Group Internet
CPE Credits	20 Credits
Communication and Marketing (COM): 9.5	
Personal Development (PD): 10.5	
Advanced Preparation	Bring a presentation for delivery during the program

### COURSE OUTLINE

#### Introduction, Goal Setting and Review

##### 1.5 PD Credits

- 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

##### 3.5 COM Credits

- 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

##### 3 PD Credits

- 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

##### 2 PD Credits

- 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 and Stress

##### 2 PD Credits

- 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

##### 6 COM Credits

- 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

##### 2 PD Credits

- List dimensions of diversity in self and others
- Define concepts related to diversity and inclusion as relevant to the workplace
- Review strategies to build trust within your teams

### LEARNING OBJECTIVES

- Describe strategic activities to grow a professional network, including key people within your firm, and existing and 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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## CUSTOMIZED PROGRAMS

### BUILD YOUR OWN

## Audit Program Menu

	CPE Credits	Field of Study
<b>✓ Communication</b>		
Listening Skills (Basic) <sup>1</sup>	2	COM
Performing Effective Inquiries (Basic) <sup>2</sup>	2	AUD/COM
Electronic Communication and Documentation (Int) *	1.5	COM
Communication Within and Across Teams (Int) <sup>4</sup>	2	COM
Creating Business Presentations (Int) <sup>4</sup>	2	COM
Business Writing Fundamentals (Basic)	1	COM
Business Writing for Auditors (Int)	1.5	COM

	CPE Credits	Field of Study
<b>✓ Supervision</b>		
Supervision Styles and Providing Feedback (Int) <sup>3</sup>	2	AUD
Teaching and Delegating (Int) <sup>3</sup>	2	AUD
Supervising and Motivating Team Members (Int) <sup>4</sup>	2	AUD
Leading Teams to Success (Int) *	2	PD
Mentoring the Future (Int) <sup>4</sup>	1	PD
Providing Written and Verbal Feedback (Adv) <sup>5</sup>	2	AUD
Conflict Management (Adv) <sup>5</sup>	2	PD
Leadership and Management (Adv) <sup>6</sup>	2	PD
Leading Virtual Teams (Group Internet Delivery)	2	PD

	CPE Credits	Field of Study
<b>✓ Audit Procedures</b>		
Audit Procedures (Basic) <sup>1</sup>	2	AUD
Cash (Basic) <sup>1</sup>	3	AUD
Inventory Observations (Basic) <sup>1</sup>	1.5	AUD
Inventory (Int) *	2	AUD/ACCT
Accounts Receivable (Basic) <sup>1</sup>	1.5	AUD
Accounts Receivable (Int) <sup>2</sup>	2	AUD
Property, Plant and Equipment (Basic) <sup>1</sup>	2	AUD
Accounts Payable (Basic) <sup>1</sup>	2	AUD
Substantive Analytical Procedures (Basic) <sup>2</sup>	2	AUD
Developing Expectations for Analytical Procedures (Int) <sup>3</sup>	2	AUD
Analytical Procedures (Adv) *	2	AUD
Fraud (Basic) <sup>2</sup>	2	AUD
Substantive Sampling (Basic) <sup>2</sup>	2	AUD
Introduction to Sampling (Basic) <sup>1</sup>	1	AUD
Beyond the Basics (Int) <sup>2</sup>	1	AUD
Control Testing (Int) <sup>3</sup>	1.5	AUD
Creative Use of Data Extraction Software (Int) *	1	AUD
Introduction to Data Analytics in the Audit (Basic) <sup>2,3,4</sup>	3	AUD
Digital Strategy for Audit Leadership (Int) <sup>5,6</sup>	2	AUD

	CPE Credits	Field of Study
<b>✓ Audit Procedures <i>continued</i></b>		
Estimates (Int) <sup>4</sup>	2	AUD
Commitments and Contingencies (Int) *	1.5	AUD/ACCT
Auditing Fair Value and Using the Work of a Specialist (Adv) <sup>5</sup>	1	AUD
Interim Procedures, Including Internal Control (Adv) <sup>5</sup>	2	AUD
Revenue Recognition Fundamentals (Basic) *	2	AUD
ASC 606: Revenue Recognition Issues (Adv) <sup>4</sup>	2	ACCT
Lease Accounting Fundamentals (Basic) *	2	AUD/ACCT
Case Study in Accounting for Leases (Adv) <sup>5</sup>	2	ACCT
Responding to Risk (Int) <sup>3</sup>	1	AUD
Responding to Assertion Level Risk (Int) *	3.5	AUD
Responding to Financial Statement Level Risk (Int) *	2.5	AUD
Designing Risk-Based Audit Procedures (Adv) <sup>5</sup>	2	AUD
Results of Substantive Audit Procedures (Adv) <sup>6</sup>	1	AUD
Impact of Technology in Accounting and Auditing	2	AUD
Remote Auditing Procedures	2	AUD

#### KEY

<sup>1</sup> = Level 1 Course

<sup>2</sup> = Level 2 Course

<sup>3</sup> = Level 3 Course

\* = Session Not Included in Any Level Programs

<sup>4</sup> = Level 4 Course

<sup>5</sup> = Level 5 Course

<sup>6</sup> = Level 6 Course

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## CUSTOMIZED PROGRAMS

### BUILD YOUR OWN

## Audit Program Menu...continued

	CPE Credits	Field of Study
<b>✓ Audit Process</b>		
Audit Process (Basic) <sup>1</sup>	2	AUD
Audit Process and Risk Assessment Procedures (Basic) *	2	AUD
Audit Process (Int) <sup>2</sup>	2	AUD
Audit Process and Understanding the Entity (Int) <sup>3</sup>	1.5	AUD
Risk-Based Auditing (Basic) <sup>2</sup>	1	AUD
Risk-Based Audit (Adv) *	1	AUD
Preparing Audit Documentation (Basic) <sup>1</sup>	2	AUD
Reviewing Audit Documentation (Int) <sup>3</sup>	2.5	AUD
File Review and Documentation (Adv) *	2	AUD
Uncorrected Misstatements and Control Deficiencies (Adv) <sup>6</sup>	1	AUD
The Future of Auditing (Adv) *	1	AUD
Learning from Inspection Reports (Adv) <sup>6</sup>	2	AUD
Advising Clients on Recent Accounting Changes (Adv) <sup>6</sup>	1	AUD

	CPE Credits	Field of Study
<b>✓ Personal Development</b>		
Professionalism (Basic) <sup>1</sup>	1	PD
Business Ethics (Basic) <sup>2</sup>	1	BE
Business Etiquette (Basic) *	1	PD
Time Management and Organization (Int) <sup>3</sup>	2	PD
Meeting People and Networking (Int) <sup>4</sup>	1	PD
Interpersonal Skills (Int) *	2	PD
Building Trust in a Diverse Workplace (Int) *	2	PD
Creative Problem Solving (Adv) <sup>5</sup>	2	PD
Time Management and Organization (Adv) <sup>6</sup>	2	PD
Business Development and Networking (Adv) <sup>6</sup>	2	PD

#### KEY

<sup>1</sup> = Level 1 Course

<sup>2</sup> = Level 2 Course

<sup>3</sup> = Level 3 Course

\* = Session Not Included in Any Level Programs

<sup>4</sup> = Level 4 Course

<sup>5</sup> = Level 5 Course

<sup>6</sup> = Level 6 Course

	CPE Credits	Field of Study
<b>✓ Engagement Management</b>		
Project Management (Int) <sup>3</sup>	2	MS
Project Management (Adv) <sup>6</sup>	1.5	MS
Changes to Audit Reporting	2	AUD

	CPE Credits	Field of Study
<b>✓ Risk Assessment and Internal Controls</b>		
Understanding the Entity (Basic) <sup>2</sup>	2	AUD
Understanding and Documenting Internal Controls (Basic) <sup>2</sup>	2	AUD
Risk Assessment Procedures and Walkthroughs (Basic) <sup>1</sup>	2	AUD
Risk Assessment Procedures (Int) *	1	AUD
Evaluating Activity Level Controls (Int) <sup>3</sup>	2	AUD
Risk Assessment (Int) <sup>3</sup>	1.5	AUD
General Technology Controls (Int) <sup>4</sup>	2	AUD
Planning for Efficient Quality Audits (Adv) *	2	AUD
Case Study in Risk Assessment (Int) <sup>4</sup>	4	AUD

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