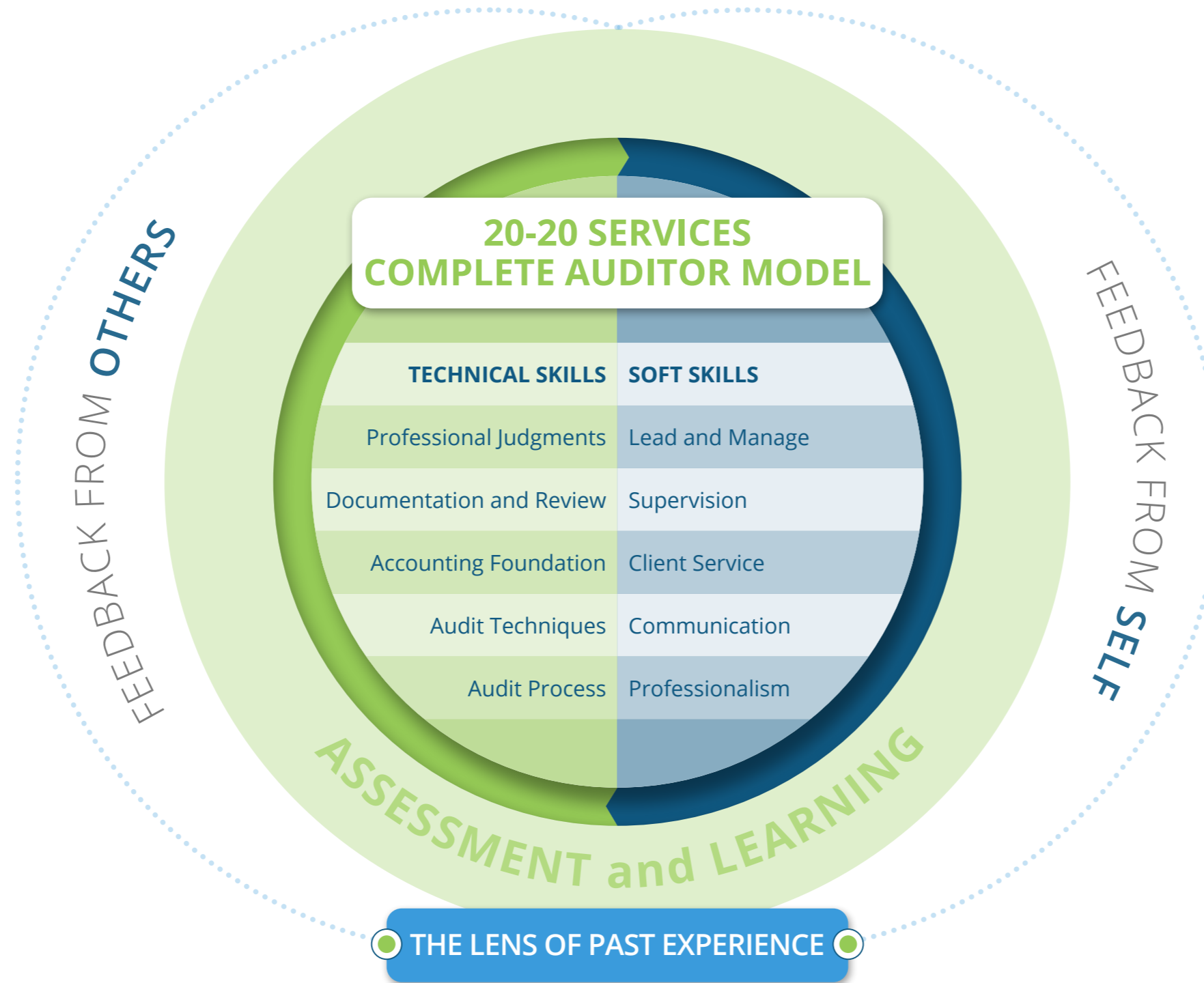


LEVEL 1 NEW HIRE TRAINING
 LEVEL 2 STAFF TRAINING
 LEVEL 3 NEW IN-CHARGE TRAINING
 LEVEL 4 EXP. IN-CHARGE TRAINING
 LEVEL 5 SUPERVISOR TRAINING
 LEVEL 6 MANAGER TRAINING
 BEST PRACTICES IN RISK-BASED AUDITING
 AUDIT PLANNING MEETING FACILITATION

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.

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LEVEL 1

- LEVEL 1 NEW HIRE TRAINING
- LEVEL 2 STAFF TRAINING
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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	Variable
Prerequisite	0-1 Year Professional Experience
Level of Instruction	Basic
Delivery Methods	Group Live Group Internet Blended Learning
CPE Credits	24 Credits
Auditing (AUD): 20	
Communications and Marketing (COM): 3	
Personal Development (PD): 1	
Advance Preparation	None

COURSE OUTLINE

Audit Concepts and Skills

- 9.5 Credits**
- Role of the new hire
 - Audit process
 - Risk assessment procedures and walkthroughs
 - Audit procedures
 - Preparing audit documentation
 - Introduction to sampling *

Audit Case Study

- 10.5 Credits**
- Cash
 - Accounts receivable
 - Inventory observations
 - Property, plant and equipment
 - Accounts payable

Professional Development

- 4 Credits**
- Listening skills
 - Professionalism
 - Business writing fundamentals

* 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, use 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.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader’s Guides and Participant materials. [Learn More](#)

WANT TO customize your training program? Pick and choose your modules from our library of content. Also, 20-20 Services can include your firm-specific sampling form at no additional charge. [Learn More](#)



LEVEL 1 NEW HIRE TRAINING	LEVEL 5 SUPERVISOR TRAINING
LEVEL 2 STAFF TRAINING	LEVEL 6 MANAGER TRAINING
LEVEL 3 NEW IN-CHARGE TRAINING	BEST PRACTICES IN RISK-BASED AUDITING
LEVEL 4 EXP. IN-CHARGE TRAINING	AUDIT PLANNING MEETING FACILITATION

LEVEL 2



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.

COURSE INFORMATION

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

COURSE OUTLINE

Audit Knowledge and Skills

- 15 Credits**
- Role of audit staff
 - Risk-based auditing
 - Audit process
 - Understanding the entity
 - Understanding and documenting internal controls
 - Beyond the basics
 - Fraud
 - Substantive analytical procedures
 - Substantive sampling

Specialized Accounting and Auditing Topics

- 7 Credits**
- Accounts receivable
 - Auditing inventory
 - Introduction to audit data analytics

Professional Development

- 2 Credits**
- Performing effective inquiries

LEARNING OBJECTIVES

- Apply basic risk assessment procedures, including updating and validating activity-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 3

- 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
- BEST PRACTICES IN RISK-BASED AUDITING
- AUDIT PLANNING MEETING FACILITATION



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	Variable
Prerequisite	2+ Years Professional Experience
Level of Instruction	Intermediate
Delivery Methods	Group Live Group Internet Blended Learning
CPE Credits	24 Credits
Auditing (AUD): 19 Accounting (ACCT): 1 Personal Development (PD): 2 Management Services (MGMT): 2	
Advance Preparation	None

COURSE OUTLINE

Audit Knowledge and Skills

- 13 Credits**
- Role of the in-charge
 - Audit process and understanding the entity
 - Evaluating activity level controls
 - Risk assessment
 - Responding to risk
 - Control testing
 - Developing expectations for analytical procedures
 - Reviewing audit documentation

Specialized Accounting and Auditing Topics

- 3.5 Credits**
- Contemporary audit techniques — databases and structured data
 - Revenue

Professional Development

- 7.5 Credits**
- Project management
 - Supervision styles and providing feedback
 - Time management and organization
 - Teaching and delegating

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.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader’s Guides and Participant materials.

[Learn More](#)

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LEVEL 4

- 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
- BEST PRACTICES IN RISK-BASED AUDITING
- AUDIT PLANNING MEETING FACILITATION



AUDIT TRAINING
Experienced In-Charge Training

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.

COURSE INFORMATION

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

COURSE OUTLINE

Audit Knowledge and Skills

- 13.5 Credits**
- Role of the senior and professional skepticism
 - Planning for efficient quality audits
 - Case study in risk assessment
 - General information technology controls
 - Auditing estimates
 - Auditor’s report and required auditor communications

Specialized Accounting and Auditing Topics

- 1.5 Credits**
- Contemporary audit techniques — data acquisition and dual purpose testing

Professional Development

- 9 Credits**
- Business writing for auditors
 - Supervising and motivating team members
 - Communicating within and across teams
 - Creating business presentations
 - Mentoring for the future

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 advanced risk assessment and accounting for estimates.
- Assess self and other individuals’ motivation and personal style for leading and communicating.
- Describe and utilize techniques for delivering an effective, compelling business presentation.

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LEVEL 5

- 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
- BEST PRACTICES IN RISK-BASED AUDITING
- AUDIT PLANNING MEETING FACILITATION

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	Variable
Prerequisite	4+ Years Professional Experience
Level of Instruction	Intermediate
Delivery Methods	Group Live Group Internet Blended Learning
CPE Credits	16 Credits
Accounting (ACCT):	1
Auditing (AUD):	11
Personal Development (PD):	4
Advance Preparation	None

COURSE OUTLINE

<p>Audit Knowledge and Skills 5.5 Credits</p> <ul style="list-style-type: none"> • Role of the supervisor • Designing risk-based audit procedures • Interim procedures, including internal control testing • Auditing fair value and using the work of a specialist 	<p>Specialized Accounting and Auditing Topics 4.5 Credits</p> <ul style="list-style-type: none"> • Leases • Contemporary audit techniques — alternatives to sampling and the value of data visualization • Current events in auditing NEW* <i>*In 2024, this module will include an overview of SAS 146 and the new updates to SQMS relevant to supervisors.</i> 	<p>Professional Development 6 Credits</p> <ul style="list-style-type: none"> • Providing written and verbal feedback • Conflict management • Creative problem solving • Leading change from the middle
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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, internal control testing, and leases (ASC 842).
- Increase effectiveness of interactions with clients and the team through consideration of conflict management, change management and supervisory approaches.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader’s Guides and Participant materials. [Learn More](#)

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LEVEL 1 NEW HIRE TRAINING	LEVEL 5 SUPERVISOR TRAINING
LEVEL 2 STAFF TRAINING	LEVEL 6 MANAGER TRAINING
LEVEL 3 NEW IN-CHARGE TRAINING	BEST PRACTICES IN RISK-BASED AUDITING
LEVEL 4 EXP. IN-CHARGE TRAINING	AUDIT PLANNING MEETING FACILITATION

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	Variable
Prerequisite	5+ Years Professional Experience
Level of Instruction	Intermediate
Delivery Methods	Group Live Group Internet Blended Learning
CPE Credits	16 Credits
Auditing (AUD): 8	
Personal Development (PD): 6	
Management Services (MGMT): 2	
Advance Preparation	None

COURSE OUTLINE

Audit Knowledge and Skills

- 6 Credits**
- Role of the manager
 - The manager review
 - Learning from inspection reports
 - Trends and transformations in auditing*

Evaluating and Communicating Results

- 2 Credits**
- Results of substantive audit procedures
 - Uncorrected misstatements and control deficiencies

Professional Development

- 8 Credits**
- Time management and organization
 - Leadership and management
 - Project management
 - Business development

* In 2024, this module will include an overview of SAS 146 and the new updates to SQMS relevant to supervisors.

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.

DELIVER your training program using in-house professionals. 20-20 Services — via our Material Licensing program — can provide Leader’s Guides and Participant materials. [Learn More](#)

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BEST PRACTICES IN RISK-BASED AUDITING
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RISK-BASED AUDITING



AUDIT TRAINING

Best Practices in Risk-Based Auditing

Our newly updated Best Practices in Risk-Based Auditing course offers the opportunity for auditors of all levels of experience to take a fresh look at the value of risk-based auditing and its impact on audit quality and efficiency. The content and length of this course can be tailored to the specific needs and goals of your audit team. For example, the agenda could be designed to increase focus on areas of higher need for your team or expanded to dive more deeply into topics such as disaggregated risk assessment, using data analytics in planning, performing effective journal entry testing, or designing substantive procedures using automated tools and techniques. Please contact us for more information.

After completing this session, participants will be able to:

- Summarize key concepts in risk-based auditing
- Describe the value of adherence to the risk assessment standards as it relates to audit quality and efficiency
- Describe the most significant areas of opportunities for increasing audit quality and efficiency on your own engagements
- Apply key concepts in risk-based auditing to your own engagements to increase audit efficiency and effectiveness

While the course is highly customizable, below is an example agenda for a 12-hour version of the course:

TOPIC	MINUTES	DESCRIPTION
Introduction	30	
Understanding the Entity	75	This section is designed to demonstrate the value of gaining a thorough UTE (including preliminary analytical procedures).
Understanding the System of Internal Control	75	This section reinforces the downstream impact of the auditor’s understanding of internal control — with a focus on why and how time spent in this area can drive audit quality and efficiency.
Risk Assessment	120	Risk assessment topics will include assessing financial statement level risks and assertion level risks, including significant risks. The content will spotlight recently updated guidance from SAS 145.
Responding to Financial Statement Level Risks	25	This section provides an overview of responses to financial statement levels risks, including the risk of management override of controls.
Responding to Assertion Level Risks	150	This section includes tests of details (sampling and non-sampling), analytical procedures and internal control testing.
Documentation	50	This topic can include a focus on one or more the following topics: linkage between risk assessment and risk response, documenting rationale for key decisions, and best practices for tick marks and review notes
Project Management	50	This topic includes budgeting, scheduling, supervision and review, and wrap-up/completion.
Closing	25	A review activity and goal setting will allow participants to reflect on the topics previously covered, increasing retention and impact of the content delivered during the session.
	600	



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.

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MEETING FACILITATION



Audit Planning Meeting Facilitation

Regulators and peer reviewers are laser-focused on audit quality. The war for talent makes audit efficiency more critical than ever. Unlock the power of risk assessment and tailored risk response with an Audit Planning Meeting Facilitation session.

Led by engaging facilitators with deep audit experience and highlighting recent risk assessment guidance from SAS 145, this day-long session allows your audit professionals to challenge previous assumptions and take a fresh look at a real-life audit engagement, including:

- An in-depth understanding of the entity
- Expanded consideration of the IT environment
- Extensive discussion of risk assessment concepts in the context of the selected audit engagement
- Critical assessment of designed responses to risk for one or more specific audit areas
- Identification of project management challenges and potential solutions

Your team will leave the session with:

- An actionable process that can be used to strengthen the impact of future planning meetings
- A renewed focus on risk, driving positive change in both audit quality and efficiency
- An updated, tailored audit response for one or more specific audit areas

Please contact us for more information.



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 BUILD YOUR OWN PROFESSIONAL DEVELOPMENT

CUSTOMIZED PROGRAMS

BUILD YOUR OWN Audit Program Menu

	CPE Credits	Field of Study
✓ Communication		
Listening Skills (Basic) ¹	2	COM
Performing Effective Inquiries (Basic) ²	2	AUD/COM
Communicating Within and Across Teams (Int) ⁴	2	COM
Creating Business Presentations (Int) ⁴	2	COM
Business Writing Fundamentals (Basic) ¹	1	COM
Business Writing for Auditors (Int) ⁴	2	COM

	CPE Credits	Field of Study
✓ Supervision		
Leading Change from the Middle (Int) ⁵	1.5	PD
Supervision Styles and Providing Feedback (Int) ³	2	AUD
Teaching and Delegating (Int) ³	1.5	AUD
Supervising and Motivating Team Members (Int) ⁴	2	AUD
Mentoring for the Future (Int) ⁴	1	PD
Providing Written and Verbal Feedback (Adv) ⁵	2	AUD
Conflict Management (Adv) ⁵	1.5	PD
Leadership and Management (Adv) ⁶	2	PD
Leading Virtual Teams (Group Internet Delivery)	2	PD

	CPE Credits	Field of Study
✓ Audit Procedures		
Audit Procedures (Basic) ¹	2	AUD
Cash (Basic) ¹	3	AUD
Inventory Observations (Basic) ¹	2	AUD
Auditing Inventory (Basic) ²	2	AUD/ACCT
Accounts Receivable (Basic) ¹	2	AUD
Accounts Receivable (Int) ²	2	AUD
Property, Plant and Equipment (Basic) ¹	2	AUD
Accounts Payable (Basic) ¹	2	AUD
Substantive Analytical Procedures (Basic) ²	2	AUD
Developing Expectations for Analytical Procedures (Int) ³	2	AUD
Analytical Procedures (Adv) [*]	2	AUD
Fraud (Basic) ²	2	AUD
Introduction to Sampling (Basic) ¹	1	AUD
Substantive Sampling (Basic) ²	2	AUD
Beyond the Basics (Int) ²	1	AUD
Control Testing (Int) ³	1.5	AUD

	CPE Credits	Field of Study
✓ Audit Procedures <i>continued</i>		
Estimates (Int) ⁴	2	AUD
Commitments and Contingencies (Int) [*]	1.5	AUD/ACCT
Auditing Fair Value and Using the Work of a Specialist (Adv) ⁵	1	AUD
Interim Procedures, Including Internal Control (Adv) ⁵	2	AUD
Broader Impact of CECL: Accounts Receivable Case Study (Basic) ⁵	1.5	ACCT
Revenue Recognition Fundamentals (Basic) [*]	2	AUD
Revenue (Int) ³	2	ACCT/AUD
Lease Accounting Fundamentals (Basic) [*]	2	AUD/ACCT
Leases (Adv) ⁵	1.5	ACCT/AUD
Foundations of Accounting for Business Combinations (Basic) [*]	3	ACCT/AUD
Designing Risk-Based Audit Procedures (Adv) ⁵	2	AUD
Results of Substantive Audit Procedures (Adv) ⁶	1	AUD

KEY

¹ = Level 1 Course ⁴ = Level 4 Course
² = Level 2 Course ⁵ = Level 5 Course
³ = Level 3 Course ⁶ = Level 6 Course
^{*} = Session Not Included in Any Level Programs

MORE AUDIT PROGRAMS >>

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CUSTOMIZED PROGRAMS

BUILD YOUR OWN Audit Program Menu...continued

	CPE Credits	Field of Study
✓ Audit Process		
Audit Process (Basic) ¹	2	AUD
Audit Process and Risk Assessment Procedures (Basic) *	2	AUD
Audit Process (Int) ²	2	AUD
Audit Process and Understanding the Entity (Int) ³	1.5	AUD
Risk-Based Auditing (Basic) ²	1	AUD
Risk-Based Audit (Adv) *	1	AUD
Preparing Audit Documentation (Basic) ¹	2	AUD
Reviewing Audit Documentation (Int) ³	2.5	AUD
The Manager Review (Adv) ⁶	1	AUD
Uncorrected Misstatements and Control Deficiencies (Adv) ⁶	2	AUD
The Auditor's Report and Required Auditor Communications (Int) ⁴	2	AUD
Learning from Inspection Reports (Adv) ⁶	2	AUD

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

	CPE Credits	Field of Study
✓ Engagement Management		
Project Management (Int) ³	2	MGMT
Project Management (Adv) ⁶	2	MGMT

	CPE Credits	Field of Study
✓ Risk Assessment and Internal Controls		
Understanding the Entity (Basic) ²	2	AUD
Understanding and Documenting Internal Controls (Basic) ²	2	AUD
Risk Assessment Procedures and Walkthroughs (Basic) ¹	2	AUD
Evaluating Activity Level Controls (Int) ³	2	AUD
Risk Assessment (Int) ³	1.5	AUD
General Information Technology Controls (Int) ⁴	2	AUD
Planning for Efficient Quality Audits (Int) ⁴	2	AUD
Case Study in Risk Assessment (Int) ⁴	4	AUD
Best Practices in Risk-Based Auditing (Int) *	8-16	AUD

	CPE Credits	Field of Study
✓ Automated Tools and Techniques		
Introduction to Data Analytics in the Audit (Basic) ²	3	AUD
Databases and Structured Data (Int) ³	1.5	AUD
Data Acquisition and Dual Purpose Testing (Int) ⁴	1.5	AUD
Alternatives to Sampling & the Value of Data Visualization ⁵	1.5	AUD

	CPE Credits	Field of Study
✓ Current Events in Assurance		
Current Events in Auditing (Int) ⁵	1	AUD
Trends and Transformations in Auditing (Adv) ⁶	2	AUD

<< MORE AUDIT PROGRAMS

KEY

1 = Level 1 Course 4 = Level 4 Course
 2 = Level 2 Course 5 = Level 5 Course
 3 = Level 3 Course 6 = Level 6 Course
 * = Session Not Included in Any Level Programs