



BrownBagCPE

Live and Local CPE



Live CPA CPE Classes in Portland, Lake Oswego, & Vancouver Fall 2019/Spring 2020 Courses

Find full course descriptions & full class schedule, or
Register for a course on-line at: www.BrownBagCPE.com

Professional Conduct and Ethics for Oregon CPAs – Updated Content » Includes recent revisions to the AICPA Code of Professional Conduct rules and new ethics rules covering CPAs who give clients financial planning advice. Covers Oregon Board of Accountancy rules » Discussion format with ethics case studies. Oregon Board of Accountancy approved for all Oregon CPAs for: **4 hrs. Oregon Ethics CPE credit. Level: Basic, Cost: \$130**

Professional Conduct and Ethics for Washington CPAs – Updated Content » Includes recent changes to Washington ethics rules, revisions to the AICPA Code of Professional Conduct, and new ethics rules covering CPAs who give clients financial planning advice » Discussion format with ethics case studies. Washington Board of Accountancy approved for: **4 hrs. Washington Ethics CPE credit. Level: Basic, Cost: \$130**

Ethics In Tax Practice – Covers common conflicts of interest » Avoiding Preparer Penalties up to \$5,000 per return » Required 1040 Disclosures » Revised Circular 230 » Revision of AICPA tax ethics rules » Dealing with problem clients » Common tax return and tax planning Malpractice areas. **4 hrs. Oregon CPA Ethics CPE credit,** 4 hrs. Wash. CPA Technical CPE credit. Level: Update, Cost: \$130** (**No Oregon CPA ethics credits if this is your first license renewal)

Choice of Entity: New Tax Rates, New Tax Rules – *The 2017 Tax Act* includes both corporate rate cuts and sec. 199A's new 20% flow-through deduction. Clients need help in reevaluating their choice of entity. Covers tax and nontax factors in initial entity selection » Dealing with business, family changes » The impact on compensation, qualified plans, SE and the 3.8% tax » Dealing with appreciated assets » How entity choice impacts the sale of a business » Estate planning for Oregon & Washington entities. **4 hrs. Technical CPE credit. Level: Basic, Cost: \$130**

Why Didn't My CPA Tell Me About That? Tax-advantaged Retirement Plans for Successful Clients - DB, cash balance, and top hat plans can maximize a client's retirement savings, tax savings, and family wealth. An experienced CLU and an actuary will teach you how to evaluate which clients would benefit, which plan to choose, and how to add this valuable service to your practice » Covers: set-up, operation, client/plan suitability, and tax-savings potential » Includes actual case studies. **4 hrs. Technical CPE credit. Level: Basic, Cost: \$130**

Washington Community Property Tax Issues - Community property rules not only have a tax impact at divorce, but may potentially apply in every transaction a spouse makes. » Covers: 1040 prep issues, property sales, retirement plan and estate planning issues, and federal preemption » Issues when clients divorce or move to or from a different state » Categorizing federal benefits » Community property agreements » Differences between California, Idaho and Washington community property rules. **4 hrs. Technical CPE credit. Level: Update, Cost: \$130**

Class Locations: (limited seating in all classes) Both Portland sites located on the Max Line

Downtown Portland: Bank of America Financial Center, 121 SW Morrison, Portland, OR 97204, **2nd Floor Classroom**

Lake Oswego: Kruse Way area, SW Meadows Road, Lake Oswego OR 97035 (Exact location on registration) Park free

Vancouver: Marshall House, Park free. **Multnomah Athletic Club (MAC)**, 1849 SW Salmon St, Portland, OR 97205

Questions? Contact: customerservice@brownbagcpe.com or (503) 222-3200

In-House Classes: We can hold CPE Classes at your office!

Details: For Oregon and Washington CPA Ethics courses, BrownBagCPE handles the course approval with the state board and provides registration, certificates, and record-keeping to satisfy Board of Accountancy state requirements.

Rates: We offer discounted group rates for small to large groups with larger discounts for larger groups, plus a discount for firms that self-copy the course materials. To learn more about our in-house CPE program, and get a firm price quote please call customer service at (503) 222-3200 and leave a message or email us at: customerservice@brownbagcpe.com.

◆ **BrownBagCPE, P.O. Box 2215, Portland, OR 97208** ◆



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Live and Local CPA CPE Ethics Classes in Portland, Lake Oswego, & Vancouver

BrownBagCPE Live CPA CPE Ethics Classes in Portland, Lake Oswego, & Vancouver

Additional and future classes are listed on our website.

			Cost	Site	Hours	
<input type="checkbox"/>	09/24/19	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	LO	4
<input type="checkbox"/>	10/29/19	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	10/29/19	1:00 - 4:45	Retirement Plans for Your Successful Clients	\$130	Port	4
<input type="checkbox"/>	10/29/19	FULL DAY	Oregon Ethics & Retirement Plans	\$195	Port	8
<input type="checkbox"/>	11/05/19	8:15 - Noon	Professional Conduct and Ethics for Washington CPAs	\$130	Vanc	4
<input type="checkbox"/>	11/05/19	1:00 - 4:45	Washington Community Property Tax Rules	\$130	Vanc	4
<input type="checkbox"/>	11/05/19	FULL DAY	Washington Ethics & Wash. Community Property Tax	\$195	Vanc	8
<input type="checkbox"/>	11/12/19	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	11/12/19	1:00 - 4:45	Professional Conduct and Ethics for Washington CPAs	\$130	Port	4
<input type="checkbox"/>	12/03/19	8:15 - Noon	Professional Conduct and Ethics for Washington CPAs	\$130	Vanc	4
<input type="checkbox"/>	12/05/19	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	LO	4
<input type="checkbox"/>	01/21/20	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	02/11/20	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	04/21/20	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	LO	4
<input type="checkbox"/>	04/30/20	8:15 - Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	04/30/20	1:00 - 4:45	Ethics in Tax Practice (Satisfies OR CPA Ethics requirement)	\$130	Port	4

Site: Port = Downtown BOA Fin Ctr. MAC = Multnomah Athletic Club LO= Kruse Way Vanc =Marshall House, Vancouver

Register and pay at www.BrownBagCPE.com or Mail this form with credit card information or a check payable to: BrownBagCPE, PO Box 2215, Portland, Oregon 97208

Attendee Name: _____ Firm: _____

Email for registration confirmation: _____ Phone: _____

Credit Card Mailing Address: _____

Name on Credit Card: _____ Total Enclosed \$ _____

Credit Cards accepted: () VISA () MasterCard () AmEx () Discover Card

Card # _____ Security # _____ Expiration Date ____/____

Signature _____ **Email notice of new course schedule? Yes No**