



BrownBagCPE

Live and Local CPE



Live CPA CPE Classes in Portland, Lake Oswego, and Vancouver Spring/Fall 2019 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 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**

Evaluating Life Insurance Policies – Every CPA and financial planner needs at least a working knowledge about how to evaluate a client's life insurance policies. This course taught by experienced CLUs covers how variable, universal life, and other types of policies work and how to evaluate the appropriate amount of client coverage. » Gain hands-on experience evaluating insurance company ratings » Decipher confusing policy illustrations. » Actual policy illustrations as 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 locations located on the Max Line

New: Multnomah Athletic Club (MAC), 1849 SW Salmon St, Portland, OR 97205 Park free in garage

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: Either Downtown Vancouver Library or Marshall House (Exact location on registration) Park free.

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 a firm price quote please contact customer service by TYPING the e-mail address below into the address field of your e-mail program: **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 future classes are listed on our website

			Cost	Site	Hours	
<input type="checkbox"/>	05/10/19	8:15-Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	MAC	4
<input type="checkbox"/>	05/14/19	8:15-Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	LO	4
<input type="checkbox"/>	05/20/19	8:15-Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	05/20/19	1:00-4:45	Choice of Entity & Sec.199A - New Rates, New Rules	\$130	Port	4
<input type="checkbox"/>	05/20/19	FULL DAY	Oregon Ethics & Choice of Entity-Sec 199A	\$195	Port	8
<input type="checkbox"/>	06/18/19	8:15-Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	Port	4
<input type="checkbox"/>	06/18/19	1:00-4:45	Evaluating Life Insurance Policies	\$130	Port	4
<input type="checkbox"/>	06/18/19	FULL DAY	Oregon Ethics & Evaluating Life Insurance Policies	\$195	Port	8
<input type="checkbox"/>	06/25/19	8:15-Noon	Professional Conduct and Ethics for Oregon CPAs	\$130	LO	4
<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"/>	11/05/19	8:15-Noon	Professional Conduct and Ethics for Washington CPAs	\$130	Van Lib	4
<input type="checkbox"/>	11/05/19	1:00-4:45	Washington Community Property Tax Rules	\$130	Van Lib	4
<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	M House	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

Site: Port = Downtown BOA Fin Ctr. MAC = Multnomah Athletic Club LO= Kruse Way Van Lib =Vanc Library M House =Marshall House

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**