



NEBRASKA
SOCIETY OF
INDEPENDENT
ACCOUNTANTS

Gear Up

FALL 2009 CATALOG

LIVE LEARNING

CPE SEMINARS, CONFERENCES AND SELF STUDY COURSES!



TRAININGCPE.THOMSON.COM/GEARUP
800.231.1860



2009 GEAR UP SEMINARS AND PRODUCTS

By Tax & Accounting Professionals, for Tax & Accounting Professionals

DEAR FELLOW PROFESSIONAL:

At Gear Up, our focus is to provide you with hands-on insight into the latest developments in the tax and accounting communities—not just the repetition of dry tax law and accounting standards. Gear Up is in its 39th year of delivering practical information you can use, always taught by the very best in the business. Our continuing education and training programs bring you the up-to-date information you need to stay current and serve your customers. Please spend some time with this catalog—it contains many practical and helpful courses.

NEW IN 2009

- **Gear Up Workshops. Bell Learning seminars** are now sponsored by Gear Up and presented as Gear Up Workshops. Gear Up Workshops provide the same invaluable subject matter that **Bell customers** have come to expect—and our seminar costs remain among the most affordably priced you'll find! Led by highly rated instructors who understand how valuable your time is, Gear Up Workshops are a perfect fit as part of your total training and CPE solution. Visit trainingcpe.thomson.com/GearUp for 2009 Workshop descriptions and schedule.
- **New courses and locations.** We are able to serve you in more Gear Up Seminar locations than ever, and are offering new or expanded courses, including [Helping Clients Through Troubled Times](#) (p. 3) and [Going Green Under the New Tax Law](#) (quickfinder.thomson.com).
- **New content.** All of our courses include the latest changes and updates. Our [Federal Tax Update](#) (p.5) course includes coverage of [President Obama's American Recovery and Reinvestment Act of 2009](#), and two of our most popular courses, the 1040 (p. 4) and Business Entities (p. 5), are expanding to include a free CD-ROM version of the manual and helpful divider tabs.
- **CFP Credit.** Gear Up is proud to offer courses accepted by the CFP board qualifying for CFP credit! Visit trainingcpe.thomson.com/GearUp to find out which courses qualify for CFP credit.

LIVE SEMINAR CONTINUING EDUCATION

Our seminar speakers are practicing tax professionals who understand your daily practice and provide insightful application of tax and accounting information—they're the best in the business! And to take care of ALL your CPE needs for the year, don't miss our week-long fall conferences: [Royal Flush](#) in Las Vegas or [Magic Week](#) in Orlando. Full details are at trainingcpe.thomson.com/GearUp.

SELF-STUDY CONTINUING EDUCATION

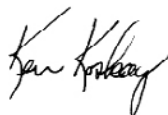
Self-study courses are available as a complete learning experience in print format with supplemental video and audio material. The video and audio presentations reproduce a live learning experience. Also available, standalone specialty topics available in print format. For complete information and to order, visit trainingcpe.thomson.com/GearUp.

CPE PARTNERS FROM THE TAX & ACCOUNTING BUSINESS OF THOMSON REUTERS

Gear Up is part of a group of CPE brands that together serve the tax and accounting industry's learning needs. Whether you're looking for online, live, or self-study options, you'll find it with the help of our interactive Course Finder, a powerful, multi-brand search tool found at trainingcpe.thomson.com. When you visit trainingcpe.thomson.com/GearUp, check out the links across the top of the page, or visit trainingcpe.thomson.com to see more options.

If you've never taken our courses, find out why tens of thousands of professionals throughout the country turn to Gear Up for their continuing education needs. We look forward to serving you again this year!

Sincerely,



Kenneth Koskay
Senior Vice President & General Manager
CPE & Training

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Gear Up's National Registry of CPE Sponsor membership pertains to Gear Up Direct seminars and Gear Up self-study programs only. Gear Up is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority of the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville TN 37219-2417. Website: www.nasba.org



Gear Up's QAS membership pertains to Gear Up self-study programs only. Gear Up is registered with the National Association of State Boards of Accountancy (NASBA) as a Quality Assurance Service (QAS) sponsor of continuing professional education. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville TN 37219-2417. Website: www.nasba.org

Gear Up has been recognized as an approved curriculum provider by the California Tax Education Council. Successful completion of this course may be reported to fulfill the (continuing education/qualifying education) requirement of the California Business and Professions Code 22250-22259. This does not constitute an endorsement by the California Tax Education Council as to the quality of the course or its contribution to the professional competence to the preparer.

All Gear Up courses require a basic knowledge of federal tax laws, and provide the latest updates and comprehensive overviews of each course topic covered. Unless otherwise stated, there are no other prerequisites or advanced preparation required to take courses. Verify CPE information at trainingcpe.thomson.com/GearUp.

Gear Up is a registered California CTEC CE Provider. Visit GearUp.com for more CTEC specifics

To determine if seminars and/or courses other than Gear Up Direct Seminars and/or Gear Up Self-Study award CPE credit, visit the website noted in each description.

Please note: CPE credit amounts based on a 50-minute hour.

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Publication Print Date: August 2009.
All prices, locations and availability subject to change without notice.

ACCOUNTING

16 CPE CREDITS | 2 DAYS -OR- 8 CPE CREDITS | 1 DAY

ACCOUNTING | BASIC

Self-Study also available

Things have changed dramatically in the operation of the typical accounting practice. This year's course will focus on five important areas: updates to professional standards, compilation and review, financial statement presentation, quality control, and a variety of special topics. Available as a 1-or 2-day course.

2-Day Available in: California, Florida,

1-Day Available in: Maryland, Pennsylvania

ACCOUNTING UPDATE

4 CPE CREDITS | 1/2 DAY | ACCOUNTING | OVERVIEW

This course addresses the most recent developments in the application of professional standards with a primary focus on the Statements on Standards for Accounting and Review Services. Subject matter will also include the latest FASB pronouncements and AICPA ethics interpretations.

Available in: Nevada

ACCOUNTING FOUNDATIONS

4 CPE CREDITS | 1/2 DAY | ACCOUNTING | BASIC

This course will cover the differences in application between GAAP and OCBOA, the preparation and presentation of financial statements including the accountant's report, key disclosures, and analytical procedures. The course will also include the study of a sample financial statement as critiqued from the perspective of a peer reviewer to help you prepare for the quality control inspection of your own practice.

Available in: Nevada

COMPILATION AND REVIEW ENGAGEMENTS

6 CPE CREDITS | ACCOUNTING | BASIC

Self-Study also available

If you prepare or report on unaudited financial statements of nonpublic companies, this course is for you. Learn about new pronouncements (SSARS) and review current pronouncements. Issues surrounding performance of compilation and review engagements including adherence with current standards are discussed.

Available in: Nevada

USING FORENSIC ACCOUNTING TECHNIQUES

4 CPE CREDITS | ACCOUNTING | BASIC

Self-Study only

Learn the differences between forensic and traditional accounting. This course will explore corporate forensics, the current regulatory environment, and financial statement fraud.

HELPING CLIENTS THROUGH TROUBLED TIMES

8 CPE CREDITS | ADMINISTRATIVE PRACTICE | BASIC

Self-Study also available

This is a time of economic challenges. This course explains how to address these issues along with the related tax aspects. In addition, we will explore opportunities to expand your practice by offering a much needed and appreciated service. Topics covered include foreclosures, short sales, debt forgiveness, bankruptcy, and dealing with the IRS and creditors.

Available in: Florida, Illinois, Maryland, Minnesota, New Mexico, New York, Nevada

Self-study offered jointly with Gear Up and Quickfinder; see page 61. Also available online from PASS Online; for more information, visit trainingcpe.thomson.com/PASS.

AUDITING NONPROFIT ORGANIZATIONS

16 CPE CREDITS | 2 DAYS | AUDITING | BASIC

Self-Study only

We will make the new standards understandable and easy to implement. Learn about nonprofit auditing including the new 990, SAS 115, auditing cost allocation plans and more.

FRAUD DETECTION

8 CPE CREDITS | 1 DAY | AUDITING | BASIC

Self-Study also available

This course meets the 8-hour Fraud CPE guidelines for California CPA recertification. We will discuss the nature of fraud, how to break the fraud triangle, SSARS 10 and 12, identity theft, and internal control.

Available in: California, Pennsylvania

PROFESSIONAL ETHICS FOR THE ENROLLED AGENT

2 CPE CREDITS | REGULATORY ETHICS | BASIC

Self-Study also available

It is time for your yearly EA Ethics immunization. Get the booster shot you need, and have the two hours fly by. Well, maybe not fly by, but we promise that we will cover Treasury Department Circular 230 along with the essential Statements on Standards for Tax Services issued by the AICPA, which compliments the rules under Circular 230.

The Office of Professional Responsibility has a new Director, Carolyn Gray, and many new disciplinary procedures are being explored. We want to make sure you understand all of the provisions so that you can be a zealous advocate for your client while fully complying with all of the rules that prescribe and proscribe our behavior before the IRS.

Available in: Arizona, California, Colorado, Florida, Idaho, Montana, Nevada, Texas, Utah, Washington

CALIFORNIA PROFESSIONAL ETHICS

8 CPE CREDITS | 1 DAY | REGULATORY ETHICS | BASIC

Self-Study also available

This course will cover pertinent tax statutes and AICPA regulations affecting ethics as well as codes and regulations specific to California CPAs. Join us for an informative and challenging class approved by the California Board of Accountancy and required for all California CPAs.

Available in: California

ETHICS FOR FLORIDA CPAS

4 CPE CREDITS | 1/2 DAY | REGULATORY ETHICS | BASIC

This class meets the CPE ethics requirements for the Florida State Board of Public Accountancy. This course addresses the major aspects and recent changes related to the Rules of Professional Conduct as they affect the CPA in public practice and in industry.

Available in: Florida

For a complete listing of our expert instructors, visit our website at trainingcpe.thomson.com/GearUp.

PRACTICE DEVELOPMENT AND MANAGEMENT

8 CPE CREDITS | 1 DAY |

BUSINESS MGMT. AND ORGANIZATION | BASIC

Self-Study also available

Make more...work less...have fun doing it! This course is designed to teach you the ten secrets to a successful tax and accounting practice. Learn how to develop relationships with clients and your team so that you can build a firm that has value whether you decide to work or sell it.

- Develop a vision and mission for your firm
- Customer pricing, retention, and relationships
- Innovative marketing and sales strategies
- Develop strategic alliances
- Establish systems and procedures for the practice, and develop key indicators to monitor the business

Available in: Colorado, Illinois, Ohio, Utah

TECHNOLOGY 2.0— HOW TO BENEFIT FROM TECHNOLOGY ADVANCES IN YOUR PRACTICE

8 CPE CREDITS | 1 DAY | COMPUTER SCIENCE | BASIC

Self-Study also available

Attend this new seminar to learn how to maintain control over security and privacy while maximizing productivity and efficiency through the proper use of technology.

Available in: California, Florida, Minnesota, Nevada

1040 UPDATE

4 CPE CREDITS | 1/2 DAY | TAXES | UPDATE

Self-Study also available

This seminar is designed for the busy tax professional who needs to know the essentials of important changes from the previous year. Coverage will include recent tax law changes, including the American Recovery and Reinvestment Act of 2009, court cases and IRS rulings in a short 4-hour format.

Pre-req: Knowledge of income tax preparation

Available in: California

CALBIZ—CALIFORNIA BUSINESS TAX

8 CPE CREDITS | 1 DAY | TAXES | BASIC

Available as 2008 Self-Study only

Learn about federal and California business tax issues from a single course. This course provides an understanding of 2008 federal tax changes and the implications of those changes for California, this gives a comprehensive understanding of all tax aspects of business decisions in California.

1040 INDIVIDUAL TAX

16 CPE CREDITS | 2 DAYS | TAXES | UPDATE

Self-Study also available

We will bring you up-to-date on all the changes and give you the essential planning tools to navigate those changes as well as provide a comprehensive review of Form 1040 complexities.

Updated for tax legislation passed in late 2008 and in 2009 along with many important topics that impact your clients in these difficult times (e.g., foreclosures, repossessions, and debt forgiveness). New cases and rulings on important topics are included. Pre-req:

Knowledge of income tax preparation. Coverage includes:

- The American Recovery and Reinvestment Act of 2009
- New credits, deductions and tax relief for 2009
- Revised education credits and benefits
- New energy credits
- Alternative Minimum Tax legislation and other extenders
- IRS collection issues and lien relief
- Reporting fraud losses and repayment of fraudulent gains
- Online sellers and bartering
- Alternatives for required minimum distributions in 2009
- Income and exclusions from cancellation of debt
- Reporting foreclosures or repossessions of residences and other real estate
- Principal residence exclusion rules tightened
- Utilizing non-deductible IRAs in anticipation of 2010

Available in: Alabama, Arizona, Arkansas, California, Colorado, Delaware, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Vermont, Washington, Wisconsin

CALIFORNIA TAX UPDATE

4 CPE CREDITS | 1/2 DAY | TAXES | BASIC

Self-Study also available

2009 will be another year of many changes for California! Expect more California tax changes as the state wrestles with balancing the budget. For the first time, California is set to introduce a carry back for net operating losses. Unless California conforms, the multitude of federal changes will create problems on the California tax returns.

Available in: California, Nevada

1041

8 CPE CREDITS | 1 DAY | TAXES | BASIC

Self-Study also available

This course is designed to help the beginner as well as the experienced practitioner. The fiduciary income and estate tax issues will be reviewed, including a complete analysis of Form 1041, U.S. Income Tax Return for Estates and Trusts. We will also review new changes in the tax laws as they relate to Form 1041.

- A quick look at the decedent's final return and how to allocate income between the decedent and fiduciary
- What a tax practitioner needs to know about estate planning and probate
- Overview of split-interest charitable trusts
- What can and cannot be deducted on Form 1041
- How to calculate the income distribution deduction
- Fiduciary accounting
- Proper handling of depreciation and rental losses
- Calculating the estate tax deduction on IRD
- Tips on building an estate practice

Note: The 8-credit 1041 course is contained in the 16-credit Estates and Trusts course; see below.

Available in: Maryland, New Mexico

ESTATES AND TRUSTS

16 CPE CREDITS | 2 DAYS | TAXES | BASIC

Self-Study also available

This course explores the decisions required in handling clients' estates and trusts from beginning to close, including tax elections, allocating assets to beneficiaries, and filing the final forms. We will analyze Form 1041, U.S. Income Tax Return for Estates and Trusts, and Form 706, Estate Tax Return, as well as all the new changes in the tax laws.

Pre-req: Knowledge of estates and trusts taxation

Available in: California, Illinois, Maryland, Minnesota, Nevada, Oregon

ESTATES AND TRUSTS UPDATE & COVERAGE OF COMPLEX ISSUES

8 CPE CREDITS | 1 DAY | TAXES | ADVANCED

A review of the Form 1041, US Income Tax Return for Estates and Trusts, and Form 706, Estate Tax Returns, as well as all the new changes in the tax laws. Pre-req: Knowledge of taxation of estates and trusts.

Available in: Illinois

BUSINESS ENTITIES16 CPE CREDITS | 2 DAYS -OR- 8 CPE CREDITS | 1 DAY
TAXES | BASIC | CFP*Self-Study also available*

This course will provide a review of new tax laws, court cases, IRS rulings and notices, and other developments. We will explore the advantages and disadvantages of C corporations, S corporations, limited liability companies (LLC), general partnerships, and limited partnerships (including family limited partnerships). This course will address important issues, planning opportunities, and techniques essential to providing service to all business clients.

- Choice of business entity considerations
- Key provisions: American Recovery and Reinvestment Act of 2009
 - Expanded small business NOL carryback elections
 - Extended depreciation benefits for business taxpayers
 - S corporation BIG tax—good-bye to the ten year wait!
 - Exclude more gain on the sale of small business stock
- Corporations
 - Getting in—the Section 351 rules
 - Controlled groups—all for one and one for all?
- C Corporations
 - Penalty taxes—PSC, AET and PHC
 - The increasingly valuable Section 199 domestic production deduction
- S Corporations
 - Final regulations on shareholder loan basis
 - Watch for the new filing penalties
 - Liberalized rules to fix election problems
- LLCs and partnerships
 - Expensive expanded penalties
 - Flexibility and complexity—making it work for your client
- Other topics
 - Expanded depreciation deductions for leaseholds, restaurants and retailers
 - Depreciation for small businesses—where we are in 2009

One Day Available in: Colorado, Florida, Georgia, Maryland, Michigan, Nevada, New Jersey, New York, North Carolina, Pennsylvania, Tennessee, Utah, Vermont, Wisconsin

In addition to the topics presented in the 1-Day course, Day 2 will cover:

- Corporations
 - Incorporation planning and the Section 83 election
 - Small business stock incentives—Sections 1045, 1202 and 1244
 - Rules for corporate liquidations or dissolutions

- C Corporations
 - AMT – a free pass for small corporations
 - Shareholders and their corporations
 - The expanded role of Schedule M-3
 - Personal service corporations—how to avoid the 35% penalty tax rate
 - Extended charitable contribution benefits
- S Corporations
 - Learn the ins and outs of the basis rules
 - Longer range planning—the QSST and the ESBT
 - The QSUB – a valuable tax “nothing”
 - Relief for self-employed persons—the pre-AGI health insurance deduction
 - Self-rental rules—a trap for unwary taxpayers
 - Penalty taxes—the BIG and others
- LLCs and partnerships
 - Qualified joint ventures—lessening the administrative burden
 - Does “checking the box” make sense for your client?
 - Capital and basis...what it all means
 - The “step up” of assets under Section 754
- Other topics
 - An update on IRS attacks on family limited partnerships
 - The new rules for tax preparer penalties
 - Nexus considerations

Two Day Available in: Arizona, Arkansas, California, Idaho, Illinois, Indiana, Maryland, Massachusetts, Minnesota, Mississippi, Missouri, New Jersey, North Dakota, Oklahoma, Ohio, Oregon, Pennsylvania, South Carolina, Texas, Virginia, Washington

FARM AND RANCH TAX UPDATE

8 CPE CREDITS | 1 DAY | TAXES | UPDATE

Self-Study also available

While the number of farmers and ranchers dwindle, their tax issues do not. Spend a day with us to review and contemplate those tax issues unique to farmers and ranchers.

Pre-req: Experience in farm and ranch taxation

Available in: Minnesota

FEDERAL TAX UPDATE

8 CPE CREDITS | 1 DAY | TAXES | BASIC

Self-Study also available

Andy Biebl and Bob Ranweiler, practicing CPAs and nationally known instructors, have teamed with Gear Up to offer practical insights into the ever-changing world of federal taxation. Federal Tax Update is a one-day, fast-paced seminar that covers the latest developments affecting individuals, corporations, pass-through entities, and estates and trusts.

Available in: California, Colorado, Illinois, Maryland, Nevada, Oklahoma, Utah, Virginia

PLANNING FOR LATER YEARS IN LIFE

8 CPE CREDITS | 1 DAY | TAXES | BASIC

Self-Study also available

From Social Security and Other Benefit Planning to Incapacity. This course studies the client's life cycle from the years leading up to retirement through death, including issues of employment, government benefits, health care and insurance.

Available in: California, Florida, Maryland

IRS AUDITS, APPEALS, AND COLLECTIONS: SUCCESSFUL STRATEGIES

8 CPE CREDITS | 1 DAY | TAXES | BASIC

Self-Study also available

If tax law can be called science, then dealing with the IRS can be called art. This class combines both science and art, and we will discuss both the technical issues and the behavioral issues of resolving matters before the IRS. The IRS has been reinvigorated, thus increased enforcement action is not only taking place now, but is expected to increase over the next few years. That means more audits and more collection matters.

Available in: California

For a complete listing of our expert instructors, visit our website at trainingcpe.thomson.com/GearUp.

Nebraska Society of Independent Accountants

Presents:

Gear Up 1040

A Gear Up CPE Seminar

Please see page 5 for a complete course description.

When:

NOVEMBER 5 - 6, 2009

Thursday - Friday

Where:

Downtown Holiday Inn

141 North 9th Street

Lincoln, Nebraska

402.475.4011

For More Information:

Nebraska Society of Independent Accountants

402.764.2314 or 402.466.8000

To Register:

Use the registration form on the next page.

Contact the Nebraska Society of Independent Accountants with questions about registration, attendance and cancellation policies for this course.

Gear Up 1040 Seminars Sponsored by NSIA

Please use this registration form for the 2009 Gear Up 1040 seminars sponsored by the Nebraska Society of Independent Accountants.

Nebraska

SPONSOR
Nebraska Society of Independent Accountants (NSIA)
402.764.2314 or 402.466.8000

1040

November 5 - 6, 2009
Downtown Holiday Inn
141 North 9th Street
Lincoln, Nebraska
402.475.4011

Print or type. One registrant per form. Duplicate if necessary.

Date: _____

Name: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: () _____ Fax: () _____

Email: _____

REGISTRATION: Please check applicable box.

Registration on or before October 23, 2009

\$250 NSIA Member

\$285 NSIA Non-Member

Registration AFTER October 23, 2009

\$275 NSIA Member

\$310 NSIA Non-Member

MAKE CHECKS PAYABLE TO: Nebraska Society of Independent Accountants

Total Due: \$_____

MAIL REGISTRATIONS TO: Nebraska Society of Independent Accountants
Attn: Mandy David
P.O. Box 203
Stromsburg, NE 68666

PLEASE NOTE:

- Fees include lunch and break refreshments.
- Please register early. Seating is limited.
- All seminars are non-smoking.
- Special dietary meals available. Notify us in advance
- Due to the number of people attending this seminar and the difficulty in regulating temperatures in hotel meeting rooms, please come prepared for varying temperatures.



For Auxiliary Aids
Contact Seminar
Sponsor

For Office Use Only

ALABAMA

The following dates in Alabama are co-hosted by our partner association. For more information or to register, call 888.829.7225.

1040

Huntsville, Oct 26-27
Mobile, Dec 7-8

ARIZONA

The following dates in Arizona are co-hosted by our partner association. For more information or to register, call 480.899.6672.

1040

Phoenix, Dec 2-3
Tucson, Nov 18-19

BUSINESS ENTITIES (2 DAY)

Phoenix, Sep 23-24

PROFESSIONAL ETHICS EA

Tucson, Nov 18

ARKANSAS

The following dates in Arkansas are co-hosted by our partner association. For more information or to register, call 501.305.9110.

1040

Little Rock, Nov 19-20
Springdale, Dec 3-4

BUSINESS ENTITIES (2 DAY)

Little Rock, Sep 17-18

CALIFORNIA

For more information or to register, call 800.231.1860.

1040

Anaheim, Nov 23-24 (09-008)
Anaheim, Jan 13-14, 2010 (09-009)
Burbank, Nov 17-18 (09-010)
Burbank, Dec 15-16 (09-011)
Carlsbad, Nov 11-12 (09-063)
Concord, Jan 6-7, 2010 (09-012)
Culver City, Nov 9-10 (09-033)
Fresno, Nov 30-Dec 1 (09-013)
Long Beach, Jan 5-6, 2010 (09-034)
Monterey, Nov 6-7 (09-060)
Ontario, Nov 2-3 (09-015)
Pleasanton, Nov 4-5 (09-032)
Riverside, Oct 28-29 (09-061)
Sacramento, Dec 9-10 (09-018)
San Diego, Dec 7-8 (09-014)
San Jose, Dec 17-18 (09-019)
Santa Barbara, Dec 9-10 (09-020)
Santa Rosa, Oct 26-27 (09-017)
Temecula, Dec 14-15 (09-050)

1040 UPDATE

(Offered with CA Tax as CalFed)

Anaheim, Nov 5 (09-CA095)
Burbank, Jan 7, 2010 (09-CA094)
Irvine, Dec 4 (09-CA088)
Irvine, Jan 8, 2010 (09-CA091)
Modesto, Dec 1 (09-CA076)
Ontario, Dec 15 (09-CA093)
Palm Springs, Nov 12 (09-CA080)
Pasadena, Nov 4 (09-CA090)
San Jose, Nov 6 (09-CA089)
Santa Rosa, Dec 3 (09-CA086)

1040 UPDATE (CONT)

Thousand Oaks/Agoura, Nov 23 (09-CA087)
Valencia, Dec 14 (09-CA098)

ACCOUNTING (2 DAY)

Burbank, Jan 5-6, 2010 (09-902)
Carlsbad, Sep 29-30 (09-910)
Ontario, Oct 1-2 (09-914)
San Jose, Sep 17-18 (09-916)

BUSINESS ENTITIES (2 DAY)

Anaheim, Oct 20-21 (09-406)
Burbank, Oct 27-28 (09-407)
Fresno, Oct 28-29 (09-435)
Sacramento, Sep 29-30 (09-424)
San Diego, Oct 29-30 (09-411)
San Jose, Oct 26-27 (09-410)

CALIFORNIA TAX

*(*Offered with 1040 Update as CalFed; 12:45 PM start time)*

Anaheim, Jan 15, 2010 (09-501)
*Anaheim, Nov 5 (09-CA595)
Burbank, Dec 17 (09-502)
*Burbank, Jan 7, 2010 (09-CA594)
Fresno, Dec 2 (09-503)
*Irvine, Dec 4 (09-CA588)
*Irvine, Jan 8, 2010 (09-CA591)
Long Beach, Jan 7, 2010 (09-513)
*Modesto, Dec 1 (09-CA576)
Ontario, Nov 4 (09-506)
*Ontario, Dec 15 (09-CA593)
*Palm Springs, Nov 12 (09-CA580)
*Pasadena, Nov 4 (09-CA590)
Sacramento, Dec 11 (09-507)
San Diego, Dec 9 (09-504)
*San Jose, Nov 6 (09-CA589)
San Jose, Dec 19 (09-508)
Santa Barbara, Dec 11 (09-509)
*Santa Rosa, Dec 3 (09-CA586)
Temecula, Dec 16 (09-514)
*Thousand Oaks, Nov 23 (09-CA587)
*Valencia, Dec 14 (09-CA598)

CALFED

Anaheim, Nov 5 (09-CA695)
Burbank, Jan 7, 2010 (09-CA694)
Irvine, Dec 4 (09-CA688)
Irvine, Jan 8, 2010 (09-CA691)
Modesto, Dec 1 (09-CA676)
Ontario, Dec 15 (09-CA693)
Palm Springs, Nov 12 (09-CA680)
Pasadena, Nov 4 (09-CA690)
San Jose, Nov 6 (09-CA689)
Santa Rosa, Dec 3 (09-CA686)
Thousand Oaks, Nov 23 (09-CA687)
Valencia, Dec 14 (09-CA698)

CA PROFESSIONAL ETHICS

Anaheim, Oct 22 (09-704)
Burbank, Aug 19 (09-702)
Culver City, Dec 17 (09-716)
Ontario, Aug 20 (09-710)
San Diego, Dec 4 (09-714)
San Jose, Aug 25 (09-703)
S. San Francisco, Jan 11, 2010 (09-715)

ESTATES AND TRUSTS

Anaheim, Oct 6-7 (09-301)
Burbank, Jul 16-17 (09-302)
San Diego, Oct 20-21 (09-304)
San Jose, Sep 30-Oct 1 (09-305)
Temecula, Oct 8-9 (09-310)

FEDERAL TAX UPDATE

Anaheim, Dec 17 (09-FTU602)

FRAUD DETECTION

Anaheim, Dec 11 (09-957)
Burbank, Aug 18 (09-952)
Burbank, Dec 3 (09-958)
Carlsbad, Sep 28 (09-953)
Ontario, Dec 16 (09-967)
Pasadena, Nov 24 (09-962)
Riverside, Jan 7, 2010 (09-955)
San Jose, Aug 24 (09-956)
Thousand Oaks/Agoura, Dec 10 (09-965)

IRS AUDITS, APPEALS, COLLECTIONS

Burbank, Aug 27 (09-857)
Pasadena, Nov 23 (09-854)

LATER YEARS IN LIFE

Anaheim, Aug 27 (09-355)
Burbank, Aug 28 (09-352)
San Jose, Oct 2 (09-359)
Temecula, Oct 7 (09-361)

PROFESSIONAL ETHICS EA

Anaheim, Nov 23 (09-763)
Anaheim, Jan 13, 2010 (09-767)
Burbank, Nov 17 (09-762)
Burbank, Dec 15 (09-766)
San Jose, Dec 17 (09-764)

TECHNOLOGY 2.0

San Jose, Aug 26 (09-261)

CALIFORNIA

The following dates in California are co-hosted by our partner association. For more information or to register, call 530.244.2728 (Redding) or 707.442.1737 (Eureka).

1040

Redding, Nov 5-6
Eureka, Dec 17-18

CALFED

Redding, Jan 11, 2010

COLORADO

The following dates in Colorado are co-hosted by our partner association. For more information or to register, call 800.323.3879 or 801.571.8549.

1040

Colorado Springs, Nov 11-12
Denver, Oct 27-28
Ft. Collins, Nov 9-10

BUSINESS ENTITIES (1 DAY)

Denver, Sep 18

FEDERAL TAX UPDATE

Denver, Dec 11

PRACTICE DEV & MGMT

Denver, Sep 17

PROFESSIONAL ETHICS EA

Colorado Springs, Nov 11
Denver, Oct 27
Ft. Collins, Nov 9

DELAWARE

The following dates in Delaware are co-hosted by our partner association. For more information or to register, call 800.535.3006.

1040

Claymont, Nov 3-4

FLORIDA

(*Part of Magic Week; see page 24 for information.)

For more information or to register, call 800.231.1860.

1040

Ft. Lauderdale, Dec 3-4 (09-023)

*Orlando, Dec 15-16 (09-058)

Tampa, Dec 1-2 (09-025)

ACCOUNTING (2 DAY)

*Orlando, Dec 18-19 (09-915)

BUSINESS ENTITIES (1 DAY)

Ft. Lauderdale, Sep 22 (09-436)

*Orlando, Dec 17 (09-421)

ETHICS FOR FLORIDA CPAS

(12:45 PM start time)

*Orlando, Dec 14 (09-FL760)

HELPING CLIENTS - TROUBLED TIMES

*Orlando, Dec 18 (09-HC609)

PLANNING FOR LATER YEARS IN LIFE

*Orlando, Dec 19 (09-360)

PROFESSIONAL ETHICS EA

(12:45 PM start time)

*Orlando, Dec 14 (09-769)

TECHNOLOGY 2.0

(Half-day, 8:00-11:45 AM)

*Orlando, Dec 14 (09-257)

GEORGIA

For more information or to register, call 800.231.1860.

8 CPE—\$199

16 CPE—\$369

1040

Atlanta, Nov 5-6 (09-026)

BUSINESS ENTITIES

Savannah, Sep 23 (09-437)

IDAHO

The following dates in Idaho are co-hosted by our partner association. For more information or to register, call 888.866.2160.

1040

Boise, Oct 26-27

Idaho Falls, Oct 19-20

BUSINESS ENTITIES (2 DAY)

Post Falls, Sep 24-25

Twin Falls, Oct 1-2

PROFESSIONAL ETHICS EA

Boise, Oct 26

Idaho Falls, Oct 19

ILLINOIS

(*Part of Windy City Week; see p. 22 for information.)

For more information or to register, call 800.231.1860.

4 CPE—\$95

8 CPE—\$199

16 CPE—\$369

1040

Chicago, Dec 17-18 (09-029)

Chicago, Oct 26-27 (09-051)

Springfield, Nov 4-5 (09-030)

BUSINESS ENTITIES (2 DAY)

Chicago, Nov 5-6 (09-415)

ESTATES AND TRUSTS

Chicago, Sep 22-23 (09-306)

FEDERAL TAX UPDATE

Chicago, Nov 12 (09-FTU611)

HELPING CLIENTS - TROUBLED TIMES

Chicago, Dec 16 (09-HC603)

PRACTICE DEV & MGMT

Chicago, Oct 28 (09-123)

INDIANA

For more information or to register, call 800.231.1860.

16 CPE—\$369

1040

Indianapolis, Dec 15-16 (09-031)

BUSINESS ENTITIES (2 DAY)

Indianapolis, Sep 17-18 (09-417)

IOWA

The following dates in Iowa are co-hosted by our partner association. For more information or to register, call 641.782.2401.

1040

Des Moines, Nov 19-20

KANSAS

The following dates in Kansas are co-hosted by our partner association. For more information or to register, call 785.827.7225.

1040

Garden City, Nov 5-6

Wichita, Nov 19-20

LOUISIANA

The following dates in Louisiana are co-hosted by our partner association. For more information or to register, call 800.847.6276.

1040

New Orleans, Dec 3-4

MAINE

The following dates in Maine are co-hosted by our partner association. For more information or to register, call 207.892.2234.

1040

Portland, Dec 7-8

1041

Portland, Sep 21

MARYLAND

The following dates in Maryland are co-hosted by our partner association. For more information or to register, visit www.msacct.org.

1040

Baltimore, Dec 15-16

Frederick, Dec 7-8

Frederick, Jan 5-6, 2010

Gaithersburg, Nov 23-24

Gaithersburg, Dec 1-2

Gaithersburg, Dec 15-16

Greenbelt, Dec 7-8

Hagerstown, Nov 16-17

Hunt Valley, Jan 4-5, 2010

Ocean City, Dec 3-4

Upper Marlboro, Jan 6-7, 2010

1041

Gaithersburg, Nov 10

ACCOUNTING (1 DAY)

Frederick, Sep 22

BUSINESS ENTITIES (1 DAY)

Baltimore, Sep 25

Frederick, Sep 16

BUSINESS ENTITIES (2 DAY)

Greenbelt, Sep 30-Oct 1

Ocean City, Oct 22-23

ESTATES AND TRUSTS

Baltimore, Sep 2-3

FEDERAL TAX UPDATE

Annapolis, Jan 19, 2010

HELPING CLIENTS - TROUBLED TIMES

Frederick, Sep 23

LATER YEARS IN LIFE

Gaithersburg, Nov 9

MASSACHUSETTS

For more information or to register, call 800.231.1860.

8 CPE—\$199

16 CPE—\$369

1040

Burlington, Dec 1-2 (09-045)

Worcester, Jan 5-6, 2010 (09-046)

BUSINESS ENTITIES (2 DAY)

Braintree, Oct 8-9 (09-416)

MICHIGAN

The following dates in Michigan are co-hosted by our partner association. For more information or to register, call 517.641.7505.

1040

East Lansing, Nov 9-10

Novi, Dec 7-8

BUSINESS ENTITIES (1 DAY)

East Lansing, Sep 17

For a complete listing of our expert instructors, visit our website at trainingcpe.thomson.com/GearUp.

MINNESOTA

The following dates in Minnesota are co-hosted by our partner association. For more information or to register, call 651.635.0706.

1040

Bloomington, Nov 4-5
Bloomington, Dec 9-10
Bloomington, Jan 6-7, 2010
St. Cloud, Nov 11-12

BUSINESS ENTITIES (2 DAY)

Bloomington, Sep 22-23

FARM & RANCH

St. Cloud, Oct 6

HELPING CLIENTS - TROUBLED TIMES

Bloomington, Aug 19

TECHNOLOGY 2.0

St. Cloud, Oct 5

MISSISSIPPI

The following dates in Mississippi are co-hosted by our partner association. For more information or to register, call 800.321.1276.

1040

Jackson, Nov 2-3

BUSINESS ENTITIES (2 DAY)

Jackson, Sep 21-22

MISSOURI

For more information or to register, call 800.231.1860.

8 CPE—\$179

16 CPE—\$279

1040

Kansas City, Dec 3-4 (09-056)
St. Louis, Nov 17-18 (09-055)

BUSINESS ENTITIES (2 DAY)

Kansas City, Aug 24-25 (09-441)

MONTANA

The following dates in Montana are co-hosted by our partner association. For more information or to register, call 406.656.1643.

1040

Billings, Oct 19-20
Missoula, Nov 2-3

PROFESSIONAL ETHICS EA

Billings, Oct 19
Missoula, Nov 2

NEBRASKA

The following dates in Nebraska are co-hosted by our partner association. For more information or to register, call 402.764.2314.

1040

Lincoln, Nov 5-6

NEVADA

(*Part of Royal Flush; see page 23 for information.)

For more information or to register, call

800.231.1860.

2 CPE—\$59

4 CPE—\$95

8 CPE—\$199

16 CPE—\$369

1040

Las Vegas, Jan 4-5, 2010 (09-054)

*Las Vegas, Nov 30-Dec 1 (09-057)

Reno, Nov 2-3 (09-062)

ACCOUNTING FOUNDATIONS

*Las Vegas, Dec 2 (09-990)

ACCOUNTING UPDATE

(12:45 PM start time)

*Las Vegas, Dec 2 (09-991)

BUSINESS ENTITIES (1.5 DAY)

*Las Vegas, Dec 2-3 (09-426)

CALIFORNIA TAX

*Las Vegas, Dec 2 (09-505)

COMPILATION AND REVIEW

*Las Vegas, Dec 3 (09-920)

ESTATES AND TRUSTS

*Las Vegas, Dec 4-5 (09-303)

FEDERAL TAX UPDATE

Las Vegas, Dec 18 (09-FTU626)

HELPING CLIENTS - TROUBLED TIMES

*Las Vegas, Nov 29 (09-HC605)

PROFESSIONAL ETHICS EA

*Las Vegas, Nov 30 (09-768)

TECHNOLOGY 2.0

*Las Vegas, Dec 2 (09-254)

NEW HAMPSHIRE

The following dates in New Hampshire are co-hosted by our partner association. For more information or to register, call 603.778.0822.

1040

Manchester, Dec 10-11

NEW JERSEY

The following dates in New Jersey are co-hosted by our partner association. For more information or to register, call 800.535.3006.

1040

Atlantic City, Dec 7-8
Monroe Township, Nov 12-13
Monroe Township, Dec 14-15
Monroe Township, Jan 7-8, 2010
Mt. Laurel, Nov 18-19
Randolph, Nov 9-10
Saddlebrook, Nov 23-24
Swedesboro, Dec 1-2

BUSINESS ENTITIES (1 DAY)

Atlantic City, Dec 9

BUSINESS ENTITIES (2 DAY)

Monroe Township, Oct 19-20

TECHNOLOGY 2.0

Monroe Township, Jul 28

NEW MEXICO

The following dates in New Mexico are co-hosted by our partner association. For more information or to register, call 505.478.2412.

1040

Albuquerque, Nov 2-3

1041

Albuquerque, Oct 2

HELPING CLIENTS - TROUBLED TIMES

Albuquerque, Oct 1

NEW YORK

The following dates in New York are co-hosted by our partner association. For more information or to register, call 716.832.7853.

1040

Buffalo, Nov 3-4

BUSINESS ENTITIES (1 DAY)

Buffalo, Oct 5

HELPING CLIENTS - TROUBLED TIMES

Buffalo, Oct 6

NEW YORK

For more information or to register, call 800.231.1860.

8 CPE—\$199

16 CPE—\$369

1040

Long Island, Nov 9-10 (09-037)
Syracuse, Nov 16-17 (09-035)

BUSINESS ENTITIES (1 DAY)

Long Island, Nov 11 (09-425)

NORTH CAROLINA

For more information or to register, call 800.231.1860.

8 CPE—\$179

16 CPE—\$279

1040

Charlotte, Oct 27-28 (09-052)

BUSINESS ENTITIES (1 DAY)

Charlotte, Sep 24 (09-438)

NORTH DAKOTA

For more information or to register, call 800.231.1860.

16 CPE—\$279

1040

Fargo, Nov 12-13 (09-038)

BUSINESS ENTITIES (2 DAY)

Fargo, Oct 8-9 (09-429)

OHIO

The following dates in Ohio are co-hosted by our partner association. For more information or to register, call 614.791.1212 or 888.959.1212.

1040

Cincinnati, Nov 17-18
Cleveland, Nov 19-20
Columbus, Nov 18-19

BUSINESS ENTITIES (2 DAY)

Cincinnati, Oct 20-21
Cleveland, Oct 22-23
Columbus, Oct 21-22

OHIO (CONT)**PRACTICE DEV & MGMT**

Columbus, Oct 29

OKLAHOMA

For more information or to register, call 800.231.1860.

8 CPE—\$169

16 CPE—\$279

1040

Oklahoma City, Oct 27-28 (09-028)

Tulsa, Oct 29-30 (09-027)

BUSINESS ENTITIES (2 DAY)

Oklahoma City, Oct 6-7 (09-422)

FEDERAL TAX UPDATE

Oklahoma City, Dec 9 (09-FTU622)

OREGON

For more information or to register, call 800.231.1860.

8 CPE—\$169

16 CPE—\$279

1040

Eugene, Oct 28-29 (09-040)

Portland, Nov 17-18 (09-039)

BUSINESS ENTITIES (2 DAY)

Eugene, Sep 22-23 (09-432)

Wilsonville, Sep 30-Oct 1 (09-431)

ESTATES AND TRUSTS

Wilsonville, Sep 10-11 (09-309)

PENNSYLVANIA

The following dates in Pennsylvania are co-hosted by our partner association. For more information, individual association contact information, or to register, visit www.pspacpe.com or call 800.270.3352. For Harrisburg/Camp Hill, call 717.625.3300.

1040

Altoona, Nov 3-4

Bethlehem, Dec 3-4

Erie, Nov 11-12

Harrisburg, Nov 23-24

Harrisburg, Dec 14-15

Philadelphia, Nov 17-18

Pittsburgh, Nov 10-11

Scranton, Nov 11-12

Trevose, Dec 3-4

ACCOUNTING (1 DAY)

Bethlehem, Oct 5

Trevose, Sep 21

BUSINESS ENTITIES (1 DAY)

Bethlehem, Oct 22

Camp Hill, Sep 28

Philadelphia, Sep 24

Pittsburgh, Oct 9

BUSINESS ENTITIES (2 DAY)

Trevose, Oct 26-27

FRAUD DETECTION

Philadelphia, Dec 10

RHODE ISLAND

The following dates in Rhode Island are co-hosted by our partner association. For more information or to register, call 401.461.1887.

1040

Warwick, Dec 10-11

SOUTH CAROLINA

The following dates in South Carolina are co-hosted by our partner association. For more information or to register, call 803.540.7521.

1040

Columbia, Nov 16-17

BUSINESS ENTITIES (2 DAY)

Columbia, Aug 24-25

SOUTH DAKOTA

The following dates in South Dakota are co-hosted by our partner association. For more information or to register, call 877.674.1996.

1040

Sioux Falls, Nov 12-13

TENNESSEE

The following dates in Tennessee are co-hosted by our partner association. For more information or to register, call 888.308.1468.

1040

Knoxville, Nov 12-13

Memphis, Oct 29-30

BUSINESS ENTITIES (1 DAY)

Knoxville, Oct 2

Memphis, Sep 21

TEXAS

The following dates in Texas are co-hosted by our partner association. For more information or to register, call 800.272.8272 or visit www.tafts.org. For Wichita Falls, call 940.691.0703.

1040

Dallas, Nov 19-20

Houston, Nov 9-10

Lubbock, Oct 21-22

San Antonio, Dec 3-4

Wichita Falls, Dec 16

BUSINESS ENTITIES (1 DAY)

Wichita Falls, Dec 17

BUSINESS ENTITIES (2 DAY)

San Antonio, Sep 24-25

PROFESSIONAL ETHICS EA

Dallas, Nov 19

Houston, Nov 9

Lubbock, Oct 21

San Antonio, Dec 3

UTAH

The following dates in Utah are co-hosted by our partner association. For more information or to register, call 800.323.3879 or 801.571.8549.

1040

Salt Lake City, Oct 19-20

Salt Lake City, Nov 23-24

BUSINESS ENTITIES (1 DAY)

Salt Lake City, Sep 30

FEDERAL TAX UPDATE

Salt Lake City, Dec 16

PRACTICE DEV & MGMT

Salt Lake City, Sep 29

PROFESSIONAL ETHICS EA

Salt Lake City, Oct 19

Salt Lake City, Nov 23

VERMONT

For more information or to register, call 800.231.1860.

8 CPE—\$199

16 CPE—\$369

1040

Burlington, Oct 19-20 (09-048)

BUSINESS ENTITIES (1 DAY)

Burlington, Oct 21 (09-440)

VIRGINIA

For more information or to register, call 800.231.1860.

8 CPE—\$199

16 CPE—\$369

1040

Fredericksburg, Nov 23-24 (09-041)

Reston, Dec 17-18 (09-043)

Tysons Corner, Oct 20-21 (09-044)

BUSINESS ENTITIES (2 DAY)

Fairfax, Aug 26-27 (09-434)

Tysons Corner, Oct 6-7 (09-433)

FEDERAL TAX UPDATE

Falls Church, Dec 3 (09-FTU627)

WASHINGTON

The following dates in Washington are co-hosted by our partner association. For more information or to register, call 800.733.6286 or visit www.waa.org.

1040

Auburn, Dec 7-8

Lynnwood, Nov 16-17

Spokane, Nov 9-10

BUSINESS ENTITIES (2 DAY)

Auburn, Sep 28-29

PROFESSIONAL ETHICS EA

Auburn, Dec 7

Lynnwood, Nov 16

Spokane, Nov 9

WISCONSIN

The following dates in Wisconsin are co-hosted by our partner association. For more information or to register, call 715.425.0482.

1040

Hudson, Nov 30-Dec 1

Wakesha, Nov 2-3

BUSINESS ENTITIES (1 DAY)

Madison, Nov 16

HELPING CLIENTS - TROUBLED TIMES

The Dells, Oct 9

Look inside for Gear Up course information and registration!

NEBRASKA SOCIETY OF INDEPENDENT ACCOUNTANTS

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GEAR UP FALL 2009 CATALOG

*Gear Up 1040
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