



Association  
of International  
Certified Professional  
Accountants®

*The unified voice of AICPA and CIMA*

# Information. Insight. Impact.

Learning you can count on.



[AICPAlearning.org](https://aicpalearning.org)

# Your trusted learning partner

**When you need to develop your staff, look first to the AICPA.**

Your business, your challenges, your goals. At the AICPA, we keep your priorities front and center. From there, we assess competencies, identify gaps and design a learning plan to ensure you are investing resources in the right areas. We want to make sure your staff has the skills they need to help your organization succeed — not just today, but in the future.



# Whatever your needs, we've got you covered.

We all learn differently. Some of us prefer the energy of immersive face-to-face events, while others gravitate toward tranquility in quiet spaces. Many enjoy the interaction of group study while others prefer self-driven courses. Some people like to dive deep into a topic at a multiday program, while others grasp material better in paced increments.

The strength of our learning programs is in our variety of options, suitable for every learning style. Choose what's best for your team or mix and match. We even have pre-designed bundles, or you can build your own.

## Your success is our success.

As the membership body for the profession, we set standards and have strong relationships across industries. Your partnership with us means priority access to changing regulations and new trends, hundreds of learning products to help your finance and accounting staff stay sharp, and effective learning outcomes with support from our award-winning learning design team.

### Our learning resources can help you:

- Attract and retain talent
- Build staff competencies and keep up with changing regulations
- Sharpen your competitive edge
- Capitalize on emerging opportunities
- Positively impact your bottom line

# Our most popular programs



## Staff Essentials series

**Ensure staff have the skills they need to meet organizational goals.** These series are based on competency models developed with industry experts. Choose individual courses, our suggested bundles or build your own.

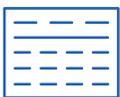
- Audit Staff Essentials – [page 4](#)
- Tax Staff Essentials – [page 5](#)
- Preparation, Compilation and Review Staff Essentials – [page 5](#)



## Certificate programs

**Empower your employees to represent your organization in specialized services.** These programs can help your business capitalize on emerging trends and transform your business. Employees earn a digital badge upon completion, which helps demonstrate proficiency to your potential clients and partners. Supporting staff development also helps you attract and retain talent.

- Client Accounting Advisory Services – [page 6](#)
- COSO Internal Control and ERM – [page 12](#)
- Cybersecurity – [page 8](#)
- Employee Benefit Plans Audits – [page 6](#)
- Forensic Accounting – [page 6](#)
- IFRS – [page 12](#)
- Not-for-Profit – [page 7](#)
- Personal Financial Planning – [page 7](#)
- Single Audit – [page 7](#)
- SOC for Service Organizations – [page 7](#)
- XBRL U.S. GAAP – [page 12](#)



## Excel for Accounting Professionals webcast series

**Help your accounting staff shave time off reporting tasks.** These hands-on online workshops go beyond standard “tips and tricks” to increase efficiency and productivity. – [page 12](#)

# Learn how and where you want.

The icons on this page illustrate the various learning formats we offer to fit your staff's busy schedules. Keep them in mind as you look through the brochure.



## On-site learning

**Bring an AICPA instructor direct to your office.** Or pair our materials with your own instructor. Choose from 200+ topics in Accounting and Auditing, Government and Not-for-Profit, Management and Consulting Services, or Tax. For a complete list of on-site courses and descriptions, visit [AICPAlearning.org/on-site](https://aicpalearning.org/on-site).

- Ideal for 10+ staff members
- Half-day, one-day or multiday options
- No travel time or expenses for your staff
- Confidential learning environment



## Conferences, workshops and schools

**Create a learning retreat for your team.** Every year, we host 60+ events across the country. Visit [AICPAlearning.org/group-conference](https://aicpalearning.org/group-conference) for more information.

- Hear from top regulators and industry experts
- Network with your peers
- Attend virtually to avoid travel costs
- Discounts for 10+ registrations annually



## Webcasts

**Watch the latest professional updates from your desk.** Your staff can attend individually or as a group. Discounts available for 5+ registrants. Courses last one to eight hours.



## Online self-study

**Learn from your desk or home or on the road.** Enroll anytime with 24/7 access, and learn at your own pace. You can even reinforce on-site group study with online courses.



## Text self-study

**Read at your own pace.** CPE credits can be earned by completing the self-study exam included with the course.

# Ensure competencies at every level with Staff Essentials.

## For financial professionals at every stage of their career

Developed by industry experts, these series build competencies using real-world scenarios. Choose our pre-designed bundles or create your own.



### Audit Staff Essentials

*Winner of Accounting Today's Best New Products 2017*

**Level 1: New Staff: Core Concepts** – Help new staff get up to speed on audit concepts and techniques including the dynamics of in-firm and client relationships.

**Level 2: New Staff: Practical Application** – Build on the knowledge of first-year audit staff with hands-on skill development.

**Level 3: Experienced Staff/New In-Charge** – Give staff with 2–3 years of experience the confidence to take on added client and engagement responsibilities.

**Level 4 : Experienced In-Charge/Senior** – Develop your senior auditors with increasingly advanced audit topics, including risk assessment, revenue recognition, fair value measurement, internal controls, pensions, equity, income taxes and leases.



## Tax Staff Essentials

**Level 1: New Staff** – Help beginning staff members develop a strong set of core skills with a focus on individual and S corporation tax compliance, business communications and more.

**Level 2: Experienced Staff** – Expand upon foundational tax knowledge with the intricacies of the underlying accounting methods and property transactions.

**Level 3: Tax Senior/Supervisor** – Provide a springboard to transition staff from preparers to planners.

**Level 4: Tax Manager/Director** – Offer the advanced technical training required to work with your firm's most sophisticated clients and clients who may face controversial tax issues.



## Preparation, Compilation and Review Staff Essentials

With expert content, interactive practice exercises and case studies, this curriculum provides comprehensive training for consistent and accurate review, compilation and financial statement preparation engagements.

- Guidance for recent SSARS developments, including SSARS No. 21, 22 and 23
- 15 hours of on-demand CPE presented in 1- to 3-hour self-paced modules

**Bundle 1:** Review Engagements Series

**Bundle 2:** Compilation and Preparation Engagements Series

# Capitalize on emerging opportunities with certificates.

## Create new practice areas or specializations

Successful completion of a certificate program results in a digital badge for your employee(s) — a highly visible way to invest in your staff's growth and transform your business. Discounts are available for three or more certificate registrations.



### Client Accounting Advisory Services Certificate

**Winner of Accounting Today's Best New Products 2017**

Give your staff the skills they need to deliver high-quality service to clients. Instead of an exam, the required learning is a combination of live workshop and online courses that cover:

- Workflow analysis and design
- Effective consultative client interactions
- How to stay abreast of emerging technologies
- Successfully onboarding clients
- Performing impactful client assessments



### Employee benefit plans audit certificate programs

These audits demand deep expertise. Auditors must meet IRS requirements and increasing U.S. Department of Labor scrutiny. Your staff can earn an EBP audit certificate to prove your firm's commitment to audit quality. They can prepare with optional learning (format varies by certificate) or go right to the online exam, based on the AICPA Competency Framework: Employee Benefit Plan Auditing. There are four EBP audit certificates:

- [Intermediate Employee Benefit Plans Audit Certificate](#)
- [Advanced Defined Contribution Plans Audit Certificate](#)
- [Advanced Defined Benefit Plans Audit Certificate](#)
- [Advanced Health and Welfare Plans Audit Certificate](#)



### Forensic accounting certificate programs

Completing these programs meets the learning requirements toward earning or maintaining the Certified in Financial Forensics credential.

- [Fundamentals of Forensic Accounting Certificate Program](#) – Provide your staff with a solid introduction to financial forensics. This program has required learning that explores professional responsibility, the legal system, planning and preparing a forensic engagement, gathering information, discovery, reporting and providing expert testimony. There is no exam.
- [Core Forensic Accounting Certificate](#) – Demonstrate knowledge in the planning, performance and reporting of a forensic engagement, including evidence identification and gathering, discovery, interview techniques, deposition and testimony, and reporting requirements.
- [Specialized Forensic Accounting Certificate](#) – Demonstrate knowledge in bankruptcy, business/individual/intellectual property damages, mergers and acquisitions, family law, and divorce.



## Not-for-profit certificate programs

### Winner of *Accounting Today's Best New Products 2016*

Build or refresh your staff's understanding of the unique requirements of not-for-profits, and improve work quality. These self-paced courses can be completed anytime, anywhere, and the course content can be used for reference. There are no exams.

- **Not-for-Profit Certificate I** – Start with the core financial knowledge your staff needs to work in or with a not-for-profit.
- **Not-for-Profit Certificate II** – Help your staff advance to the next level of responsibility as they apply complex financial concepts in a variety of NFP settings. After completing this course, staff will be able to successfully prepare financial statements, complete the Form 990, build complex budgets and perform risk assessments.



## Personal financial planning certificate programs

Expand your firm's service offerings into this fast-growing area. Roughly 10,000 baby boomers a day are estimated to turn 65 over the next 10 years, according to a Pew Research Center study. As an incredible amount of wealth changes hands, boomers will seek advice as they deal with the increased complexities associated with retirement and investment planning. Complete the learning to enhance PFP education. CPAs can collect all five certificates to meet the exam and learning requirements of the PFS credential. The education associated with these programs qualifies toward the CPA/PFS and CFP credentials' learning requirements.

- **Retirement Planning Certificate Program**
- **Investment Planning Certificate Program**
- **Risk Management and Insurance Planning Certificate Program**
- **Estate Planning Certificate Program** (available Spring 2018)
- **FP Practical Application Certificate** (available Spring 2018)



## Single audit certificate programs

Give your audit staff a competitive edge as they demonstrate their level of expertise and commitment to excellence to potential clients. They can prepare with optional learning or go right to the online exam. We offer two competency levels:

- **Intermediate Single Audit Certificate**
- **Advanced Single Audit Certificate**



## Advanced SOC for Service Organizations Certificate Exam

Test your staff's knowledge and ability to plan, perform, and report on both SOC 1<sup>®</sup> and SOC 2<sup>®</sup> engagements. The timed, online certificate exam consists of 75 multiple choice questions. Those who pass will be awarded with a digital badge to verify their skill. To prepare for the exam, students may:

- Enroll in our SOC for Service Organizations School (coming mid-2018)
- Attend a live program (coming mid-2018)
- Answer sample exam questions
- Review the AICPA Competency Framework: Assurance Services

# Minimize cybersecurity risks for your company and clients.

Cyberattacks are becoming more common and more sophisticated. It's not a question of if you will be affected, but when. Put the right policies and procedures in place, and educate everyone in your organization on how to minimize cybersecurity risk.



## Cybersecurity certificates

### Cybersecurity Fundamentals for Finance and Accounting Professionals Certificate

- Gain an understanding of cyber threats and how to protect your organization
- Developed with global cybersecurity expert Chris Romeo
- Includes an overview of the AICPA Cybersecurity Risk Management Reporting Framework and details of the related description criteria
- Webcast, self-study online or combine a workshop with four self-paced modules
- Earn a digital badge

### Cybersecurity Advisory Services Certificate

- Become indispensable to your clients as your staff offers guidance on cybersecurity risk management programs
- Covers the nature and types of cybersecurity advisory services, key considerations of each service and the elements required to effectively perform advisory services
- Earn CPE credits and a digital badge

### SOC for Cybersecurity Certificate

- Build a foundation to perform attestation engagements to examine and report on organizations' cybersecurity risk management programs
- Application of the AICPA's Cybersecurity Risk Management Reporting Framework
- Analysis and reporting of organizations' cybersecurity risk management programs
- Earn CPE credits and a digital badge



## Cybersecurity webcasts

Gather your team and attend any webcast as a group. Each attendee will earn CPE credit. Sample titles below. Visit [AICPAStore.com/cybersecurity](https://aicpa.com/store/cybersecurity) to see current titles.

- Time to Get Serious About Information Security
- Data Breaches and Other Cyber Frauds: A 21st Century Risk to Your Organization
- How to Fight Back Against Hackers
- Identity Theft: Preventing, Detecting and Investigating
- Cybersecurity Series – Using the Internet Safely and Securely
- Cybersecurity Series – Protecting Your PC and Mobile Devices
- Cybersecurity Advisory Engagements Essentials

## Featured publications

Use these resources to gauge the effectiveness of an entity's cybersecurity efforts:

### Trust Services Criteria (2017)

- Established by the AICPA Assurance Services Executive Committee (ASEC)
- Presents criteria to evaluate and report on controls over the security, availability, processing integrity, confidentiality or privacy of an entity's information and systems
- Useful in reporting on SOC for Cybersecurity engagements, SOC 2<sup>®</sup> engagements and SOC 3<sup>®</sup> engagements

### Attestation Guide (2017)

- Guidance for performing and reporting on an entity's cybersecurity risk management program and controls in accordance with the AICPA attestation standards
- Part of the AICPA's suite of System and Organization Controls – or SOC – service offerings



# Sharpen your competitive edge with management accounting resources.

Develop better business leaders. These resources are ideal for anyone looking to increase their business acumen and add more value to the organization.



## **CGMA Program: Learning Pathway**

The Chartered Global Management Accountant (CGMA) program builds technical, business, people and leadership skills. Those who complete all required learning, exams and experience qualify to take an in-person exam to earn the CGMA designation.



## **Strategic Management Accounting** (53.5 CPE credits)

Buy the bundle of 37 courses, build your own bundle, or choose individual courses.

- Develop an organizational strategy
- Consider risk factors and corporate governance
- Learn tools to implement strategy and managing change
- Measure, report and evaluate financial performance



## **Financial Performance Management** (62.5 CPE credits)

Purchase the 21-course program or buy only courses you need. Topics include:

- Generating and analyzing data
- Learning pricing strategy and how to calculate relevant costs
- Applying budgeting and forecasting techniques
- Measuring performance and analyzing variances





## MBAexpress resources

Give your staff a broad business perspective. These courses teach how to work effectively in our fast-paced, complex business environment. Key concepts include:

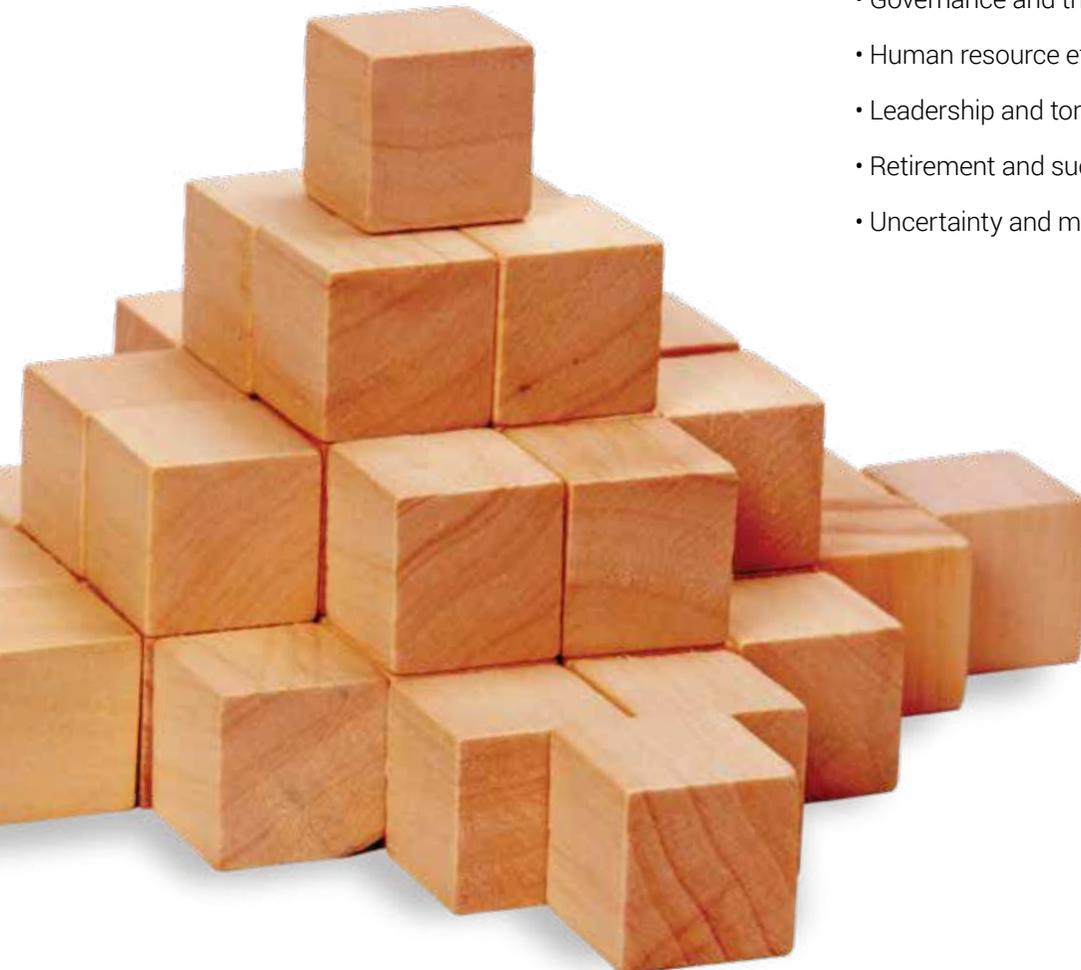
- Business strategy, budgeting and planning
- Risk management and disaster recovery
- Use of KPIs to motivate, measure and achieve results



## Controller series

Designed for CPAs, industry accounting and finance staff and C-level corporate officers, these short courses explore key economic, financial and regulatory issues. Topics include:

- Competing globally
- Debt and equity mix
- Effective communication and negotiation
- Enterprise risk management
- Going lean
- Governance and the board
- Human resource effectiveness
- Leadership and tone at the top
- Retirement and succession planning
- Uncertainty and managing growth



# Prepare your staff to meet your goals.

Make sure your employees have the technical skills they need to support your business success.



## COSO certificate programs

Drive better business performance, and teach your staff the principles behind these COSO frameworks. Participants will learn how to deter fraud, make strategic decisions and improve risk management practices. Available in self-study online or a combination of workshop and online courses.

- **COSO Internal Control Certificate Program** – Based on the COSO 2013 Internal Control – Integrated Framework
- **COSO Enterprise Risk Management Certificate Program** (Available early 2018) – Based on the COSO 2017 Enterprise Risk Management – Integrating With Strategy and Performance Framework



## IFRS Certificate Program

If you have non-U.S. subsidiaries or structure transactions with partners, vendors and customers globally, your finance staff need more than a passing knowledge of the differences between IFRS and U.S. GAAP. Help your team increase IFRS competency and demonstrate their expertise to your customers and vendors.



## XBRL U.S. GAAP Certificate Program

Build the knowledge needed for the creation and review of XBRL financial statements using the U.S. GAAP Taxonomy. Developed jointly by XBRL U.S. and the AICPA, this program provides your staff with a solid understanding of how to work with SEC reporting, including tagging financials, detailed footnotes, validation, extensions, managing release versions and best practices.



## Excel for Accounting Professionals webcast series

Help your accounting staff shave time off reporting tasks. These hands-on workshops go beyond standard “tips and tricks” to increase efficiency and productivity.

- Taught by Excel expert Jeff Lenning
- 30+ Excel features, functions and techniques
- Practice building robust workbooks with real-world scenarios
- Group rates available for registering 3+ staff members

**Also available:** An enhanced series covering PivotTables and Pivot Charts. Register for the Streamlined Excel Reporting Series.



# Subscriptions and online favorites



## CPEXpress® online learning

**Access 450+ on-demand courses with an annual subscription.** Includes free quarterly updates for Tax, A&A, SEC, Governmental and Not-for Profit. Group rates available for registering 5+ staff members.

- Unlimited 24/7 access allows staff to train when they want
- 1-hour and 2-hour courses to fit busy schedules
- Track the progress of each staff member
- Print certificates of completion on demand



## Annual Webcast Pass

**Purchase a year of unlimited access to a library of 500+ webcasts.** Your staff will stay up to date with valuable professional guidance. Discounts available for 3+ staff members.

- Live Q&A with presenters on hot topics
- No travel time or costs
- CPE/CPD credit with zero tests to complete
- Archived webcasts for reviewing and reinforcing topics



## CGMA® Essentials

**Get unlimited access to a library of recorded webcasts and conference sessions.** Your annual subscription includes hot topics and career skills.

Note: Participants earn CPD credits rather than CPE.

- Updated monthly with new content
- Presented by leading subject matter experts
- Audio and video formats
- Complete flexibility on when, where and how often staff learn



## Conference Vault

**Make recorded conference sessions available to your staff.** Recordings will be available for 11 months beginning four weeks after the conference ends.

- Anytime access to select AICPA conference sessions
- Your choice of conferences that fit your needs
- Customized company-specific URL to access recordings



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