



*Worldwide leaders in public and management accounting*

# Information. Insight. Impact.

Learning you can count on



[AICPAlearning.org](http://AICPAlearning.org)

# Your trusted learning partner

When you need to develop your staff, look first to the Association of International Certified Professional Accountants – the unified voice of AICPA and CIMA.

Your business, your challenges, your goals. Whatever your needs, we've got you covered. We can assess competencies, identify gaps and design a learning plan to ensure you are investing resources in the right areas. Ensure your staff has the skills they need for your organization to succeed – not just today, but in the future.



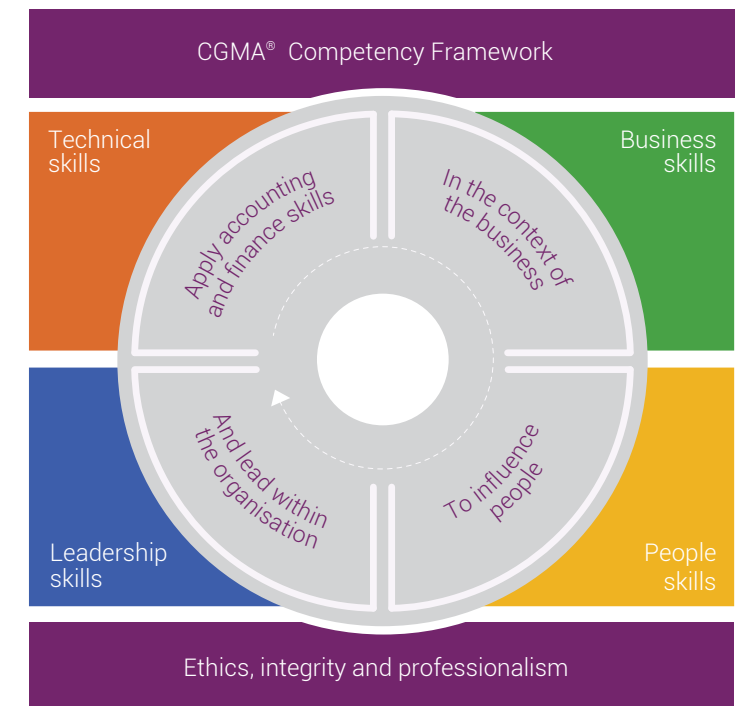
## Go beyond disruption

There are many changes affecting your organization, such as evolving technologies, new regulations and competitive pressures. These changes bring opportunities for new competencies and specializations. Help your staff adapt and thrive. Make staff development a strategic priority.

Learning programs that keep technical skills current can increase accuracy and efficiency. Strong business, communication and leadership skills are also needed to rapidly deliver insights and options to executives.

### Your success is our success.

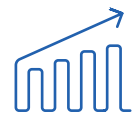
With the combined expertise of AICPA and CIMA, we set standards and have strong relationships across industries. Your partnership with us means priority access to changing regulations and new trends, hundreds of learning products to help your finance and accounting staff stay sharp, and effective learning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



### Our learning resources can help you:

- Attract and retain talent
- Build staff competencies and stay agile
- Sharpen your competitive edge
- Capitalize on emerging opportunities
- Positively affect 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.

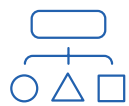
- Audit Staff Essentials – [page 4](#)
- Tax Staff Essentials – [page 5](#)
- Preparation, Compilation and Review Staff Essentials – [page 5](#)



## 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.

- Blockchain – [page 9](#)
- Client Accounting Advisory Services – [page 6](#)
- COSO Internal Control and ERM – [page 12](#)
- Cybersecurity – [page 8](#)
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- Employee Benefit Plans Audits – [page 6](#)
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- Not-for-Profit – [page 7](#)
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- Single Audit – [page 7](#)
- SOC for Service Organizations – [page 7](#)
- XBRL U.S. GAAP – [page 12](#)



## Essential skills

**Ensure your team has the skills to clarify complexity, anticipate risk and create opportunity.** Work is changing. Many accounting and finance professionals lack the necessary skills to perform, lead and communicate.

- Human intelligence – [page 10](#)
- Financial leadership – [page 10](#)



## Microsoft tools

**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.

- Excel Series for Accounting Professionals – [page 12](#)
- Streamlined Excel Reporting Series – [page 12](#)
- Microsoft PowerBI series – [page 12](#)

# Learn how and where you want.

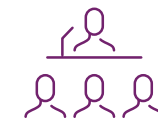
The icons on this page illustrate the various learning formats we offer to fit your staff’s busy schedules. Keep them in mind as you look through the brochure.



## 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 five 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
- PFP Practical Application Certificate



### 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® and SOC 2® 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
- Attend a live program
- Answer sample exam questions
- Review the AICPA Competency Framework: Assurance Services

# Future-proof your business with certificate programs.

You are surrounded by disruption and new technologies that will forever change the way accounting is done. Re-skill your team to adapt and thrive. Successful completion of a certificate program results in a digital badge for participants – a highly visible way to invest in your staff's growth and transform your business or practice. Discounts are available for five or more registrations.



## 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.



## Blockchain Fundamentals for Accounting and Finance Professionals Certificate

Prepare your organization for a successful blockchain implementation. This course will provide an understanding of the impact of adopting blockchain on your organization, partners and clients.

Topics include:

- Overview of blockchain technology, structure and functionality
- Benefits, opportunities, risks and challenges of implementing blockchain
- Regulatory concerns and governance
- Practical applications and use cases

Additional courses are available to explore the implications blockchain is having on specific industries and practice areas, including:

- Audit and Assurance Services
- Financial Services
- Insurance Services
- Health care
- Supply Chain
- Tax Services



## Data Analytics Executive Series

Empower your finance and accounting staff to make proactive, data-driven organization decisions and provide your organization a competitive advantage.

Participants earn the Data-Driven Leader Distinction upon completion of the four webcasts.

Topics will cover:

- Tools to modernise data analysis skills
- Proactive decision-making strategies
- Distilling data into actionable insights
- How to handle common talent and change management considerations
- How to get buy-in from key stakeholders



## Data Analyst Certificate Programs

Data analysis is a critical skill set for success in today's business environment. These programs review the many tools available for integrating and analyzing data and how to apply it to business needs. There are five certificates available:

- Data Analysis Fundamentals Certificate
- Application of Data Analysis Essentials Certificate
- Data Analytics Modeling Certificate
- Forecasting and Predictive Analytics Certificate
- Data Visualization Certificate



## Robotic Process Automation Strategy for Business Leaders

Forty percent of transactional accounting work is expected to be automated by 2020 (McKinsey Research). This can dramatically increase efficiency, speed and productivity – and free staff for more critical-thinking work.

This 6-hour program covers:

- Understanding robotic process automation (RPA)
- How to build your RPA strategy
- Changing your culture with RPA



## Robotic Process Automation Fundamentals for Accounting and Finance Professionals Certificate Program

Help ensure your team is ready for this rapidly expanding technology. This program provides a solid overview of RPA and what to consider when choosing and implementing an automation tool.



# Improve finance business partnering.

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



## Human intelligence

More and more tasks are becoming automated and artificial intelligence is improving. Help your staff understand and obtain the communication and leadership competencies that will be most valued for our profession.

Sample video titles include:

- Transformative Leadership in Finance
- Productivity Ninja: Think Productive
- Fail-Safe Strategies to Conquer Conflict at Work
- Communicating Finance to Non-finance Leaders
- Lead Like a Legend: How to Master Your Influence

Sample webcast titles include:

- Practical Facilitation and Negotiation
- Coaching and Mentoring
- Conflict and Difficult People
- Global Diversity: Driving Innovation Through Inclusion
- Managing Change Primer



## CGMA Finance Leadership Program

Create a strong pipeline of leadership talent. This program builds technical, business, people and leadership skills. There are three levels: operational, management and strategic. The candidate's experience and academic degree determine the level of entry. Those who satisfy the 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:

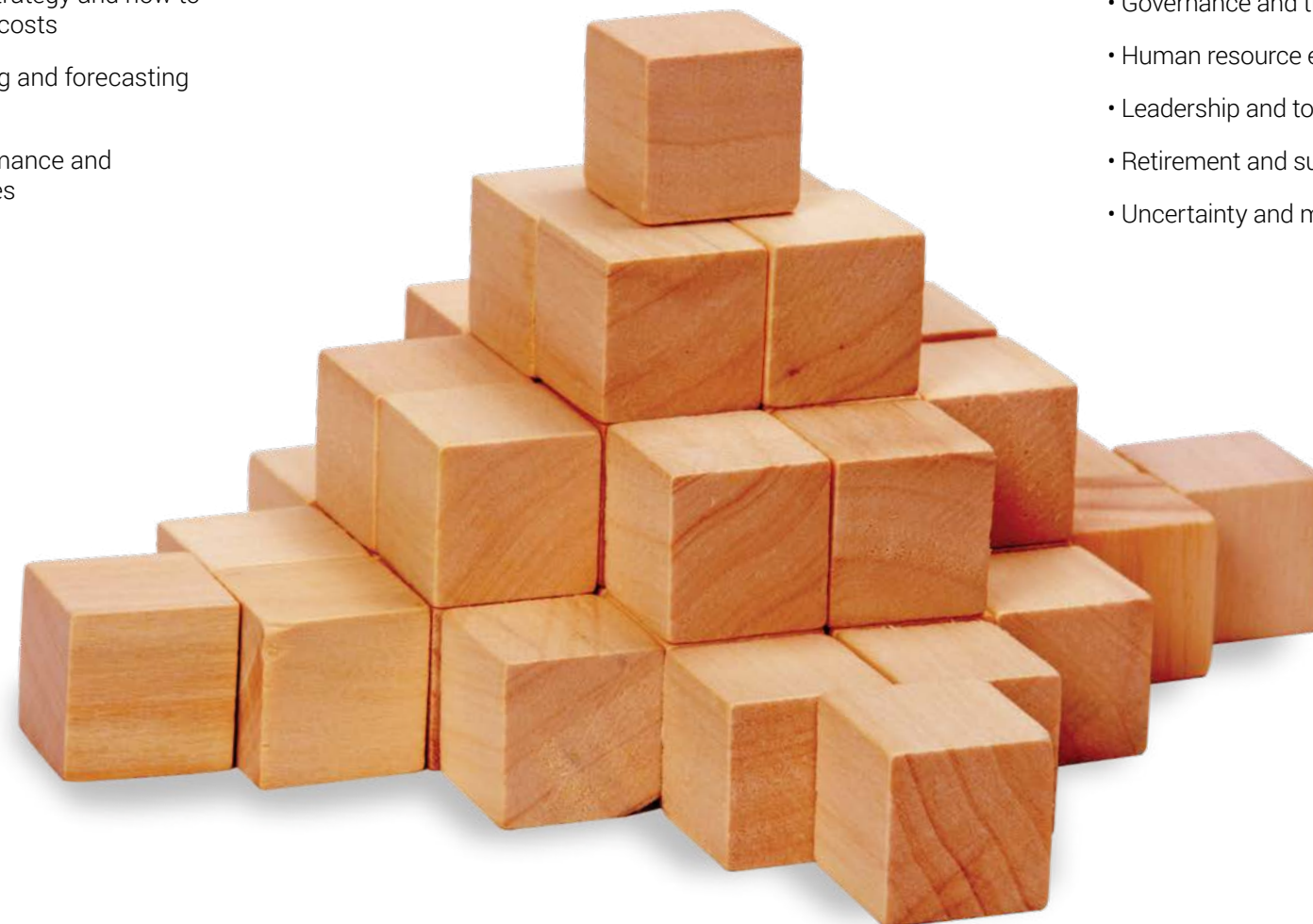
- Business strategy, budgeting and planning
- Risk management and disaster recovery
- Use of KPIs to motivate, measure and achieve results



## 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



# Increase staff productivity.

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** – 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.



## Microsoft tools

- **Excel Series for Accounting Professionals** – Help your accounting staff shave time off reporting tasks. Jeff Lenning covers more than 30 Excel features, functions and techniques.
- **Streamlined Excel Reporting Series** – Jeff Lenning guides your team through step-by-step demonstrations of how to create and use PivotTables and PivotCharts.
- **Microsoft PowerBI Series** – This video series will help your team understand when and how to use these tools to take data analysis to the next level and improve productivity.

# 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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