



Webinar Series Loss Control & Risk Management 2022

McGowanPRO and the CPAOnePro Accountants Professional Liability Program are pleased to offer the following Live Risk Management Webinar Series for all McGowanPRO clients and friends. These exclusive webinars offer CPAs valuable risk management tools that experts in the accounting profession are presenting. Each live webinar is 50 minutes long and gives the attendee 1 hour of free CPE credit. The series may also provide a premium credit towards the firm's professional liability insurance. Please ask your agent for more details and register today.

Please be aware that all webinars are intended to be informational and should not be construed as legal advice.

JUNE 7 @ 1 PM

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SESSION 1: Data Breach/Cyber - Tips, Tricks, and Practices (1 CPE)

Presenter: Rob Ferrini

In this updated presentation, Rob Ferrini will bring his experience counseling clients to discuss how to best protect your organization's brand, value, and assets in the face of growing data breaches and ransomware attacks. He will also provide practical steps your firm can take to implement policies and processes to protect company data and client information. He will also discuss available insurance options, how different insurance policies will respond to a Data Breach, and where a Cyber Liability policy can fill coverage gaps.

Delivery Method: Group Internet Based **Field of Study:** Information Technology

JUNE 29 @ 1 PM

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SESSION 2: Terminating the Client Relationship – How To Say Goodbye to Your Unwanted Clients (1 CPE)

Presenter: Nancy Reimer Esq. and Patrick Cosgrove Esq.

When it comes to risk management and avoiding claims, sometimes the best client is an ex-client! In this 50-minute webinar, Nancy Reimer and Patrick Cosgrove, both of the law firm Freeman Mathis & Gary, will address how to determine whether a CPA should keep a particular client, the warning signs, and when appropriate, how to terminate a client correctly.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

JULY 12 @ 1 PM

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SESSION 3: New R&D Expense and R&D Tax Credit Filing Requirements (1 CPE)

Presenter: Randy Crabtree

Don't let the new R&D expense capitalization rules and the new R&D tax credit filing requirements surprise you and your clients. In this 50-minute presentation, tax wizard Randy Crabtree will discuss the new 2022 requirements. R&D expenses have been able to be deducted since the 1950s; as of January 1, 2022, that's no longer the case. Find out what effect this will have on your client's income tax bill. Also, the IRS has changed the filing requirements for R&D tax credits. Do you know how to submit five additional pieces of information on any R&D tax credit claims filed on an amended tax return? Find out what they are and how you can track them.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

JULY 26 @ 1 PM

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SESSION 4: The Merger Process and Merger Negotiation Checklists (1 CPE)

Presenter: Joe Tarasco

Most M&A deals typically go through five stages: preliminary discussions; transactional detail meetings and negotiations; an initial agreement outlined in a memo of understanding or letter of intent; due diligence; and the transaction agreement and signing of the partner/shareholder agreement. Determining and agreeing on the best criteria to achieve a successful merger is imperative to making the right decision at the right time. To have a successful merge, developing a plan to guide the merger transaction and related checklists, starting with selecting the best firm to partner with and combine with and the ensuing pre- and post-merger activities, is crucial.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

AUGUST 9 @ 1 PM

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SESSION 5: Risk Management for Accountants—Part 1 (1 CPE)

Presenter: Ralph G. Picardi, Esq.

This is a 50-minute webinar led by Ralph G. Picardi, Esq., a former CPA whose law practice is dedicated to defending and advising accounting firms and their insurers on professional liability matters. Topics include, among others, the risk environment, client acceptance and continuance, engagement letters, disengagement, billing and collection, file retention, and confidentiality issues (e.g., subpoenas; IRC §7216).

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

AUGUST 23 @ 1 PM

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SESSION 6: Emerging Trends, Lowering CPA's Legal Exposure In Areas That You May Not Have Thought Of (1 CPE)

Presenter: John F. Raspante, CPA, CDFA, MST - McGowanPRO's Director of Risk Management

This presentation will discuss new and emerging exposures with risk management tools and procedures to help minimize the risk of doing business in today's business climate. Topics will include ongoing issues around the current pandemic, Pass-Through entity tax, Cannabis, the impact of the Wayfair Decision, digital currency, and more.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

SEPTEMBER 6 @ 1 PM

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SESSION 7: Mitigating Fraud Claims (1 CPE)

Presenter: John F. Raspante, CPA & Stephen Vono

In this 50-minute presentation, John and Stephen will discuss an ongoing source of claims that continually occur. The presenters will provide an overview of fraud, the types of claims that accountants face concerning fraud, and how to best lower the accounting firm's exposure to claims related to fraudulent activity. They will discuss claim scenarios and proposed best practices in claim mitigation.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

SEPTEMBER 20 @ 1 PM

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SESSION 8: Keys to Documentation and Record Retention for Accounting Professionals (1 CPE)

Presenter: Joseph H. Jones, Jr., Esq. Director of Risk Management | Professional Liability – Travelers; and Julie Lindstrom, Esq. Claims Counsel | Travelers

Proper documentation and record retention are crucial for accountants to support their practice and help minimize professional liability risk. The effects of modern communication on our perceptions of what records are vital need to be recognized and understood. Strategies for adequate documentation and record retention include understanding what to keep and why. The format of documentation and record retention and how long to keep them are equally important. Accountants may be unsure if they need to keep certain records or documents or about how to store them. Statutory obligations, professional standards, and "best practices" can provide guidance.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

OCTOBER 5 @ 1 PM

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SESSION 9: Client Information and Cyber Security (1 CPE)

Presenter: Konrad Martin

Cybercriminals are thriving amidst the current cloud and cyber environment. A global pandemic, massive remote work transitions, government stimulus payments, and an irregular tax calendar are all targets for attackers to exploit. For CPAs, cybersecurity is becoming a constant battle to protect their client's data.

This webinar is an engaging source of critical information that will help your firm take control of its security in an ever-changing landscape. Participants will come away with a clear picture of remote work security risks, their impact on their clients, and the most effective steps to mitigate them. They will receive actionable advice on creating resilient security that complies with State Security laws and builds layered protection against the most common attack varieties.

Delivery Method: Group Internet Based **Field of Study:** Information Technology

OCTOBER 25 @ 1 PM

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SESSION 10: Are You Covered For That Exposure? The Different Insurance Policies Every Professional Service Provider Should Be Aware Of (1 CPE)

Presenter: Rob Ferrini

In this 50-minute presentation, Rob Ferrini walks the listener through the coverage of each policy that a service provider should have and how they fill in coverage gaps. Policies to be discussed are Professional Liability Insurance (aka E&O), Cyber Liability Insurance, Commercial Crime (aka Employee Dishonesty), Employment Practices Liability Insurance (aka EPLI), Directors & Officers Liability Insurance (aka D&O), and Fiduciary Liability Insurance.

Delivery Method: Group Internet Based **Field of Study:** Information Technology

NOVEMBER 2 @ 1 PM

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NOVEMBER 15 @ 1 PM

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DECEMBER 6 @ 1 PM

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**All seminars start at 1:00 PM
EST on their scheduled date.**

SESSION 11: Risk Management for Accountants—Part 2 (1 CPE)

Presenter: Ralph G. Picardi, Esq.

This is a 50-minute webinar led by Ralph G. Picardi, Esq., a former CPA whose law practice is dedicated to defending and advising accounting firms on professional liability matters. It picks up where Ralph's Part One webinar left off. Topics include, among others, general principles of defending claims, exposure to clients; exposure to third parties; and reporting claims/incidents to insurers.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

SESSION 12: Engagement Letters A to Z (1 CPE)

Presenter: John F. Raspante, CPA, CDFA, MST - McGowanPRO's Director of Risk Management

Engagement Letters are an essential tool in any CPA's risk management toolbox! Many times well-written engagement letters have stopped a claim from happening. In this 50-minute presentation, presenter John Raspante will discuss the engagement letter in response to the changes in tax law and the challenges in the accounting profession. John will point out the different caveats and clauses that all CPA firms should consider in their engagement letter language. He will discuss caveats to address the rapid changes in tax, and A&A. Included will be clauses to manage the impact of the Way Fair decision, Pass-through entity taxes, and cannabis.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

SESSION 13: Claims Stories— The Not So Good, The Bad, and The Ugly (1 CPE)

Presenter: Jeremy Monosov, Esq and Rocco Malandrino

Listen to what an insurance company attorney who defends accounting firms has to share about the worst part of any CPA's job-- a claim against them. The presenters, Jeremy Monosov, Esq. and Rocco Malandrino of Navigators Insurance, will share why claims happen, what are most frequent, and the actual cost of a claim. The presenters will tell you that the price is not just dollars. They will present claim examples and what accountants can do to minimize those claims.

Delivery Method: Group Internet Based **Field of Study:** Business Management & Organization

Webinar Series schedule is subject to change. These webinars are not intended to be legal advice.

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