

# BrownBagCPE - Spring 2009

## ...CPE for Busy Professionals... Live CPE Classes in Oregon & Washington

### CPA Ethics Courses

**Prof. Conduct and Ethics for Oregon CPAs** - Live & local course relevant for CPAs in business, industry, and public practice. ■ Course emphasizes the Oregon Accountancy Act & Board Rules ■ Includes recent 2008 changes ■ Oregon Board of Accountancy approved for all Oregon CPAs for 4 hrs. of Ethics CPE credit. Level:Basic, 4 hours \$115\*(1)

**Prof. Conduct and Ethics for Washington CPAs** - Relevant for CPAs in business, industry, and public practice. Updated ■ Approved by Washington Board of Accountancy for 4 hrs. of Ethics CPE credit. Level:Basic, 4 hours \$115\*(1)

**Ethics In Tax Practice** - Conflicts of Interest ■ Preparer Penalties ■ 1040 Disclosures ■ Revised Circular 230 ■ Revisions to AICPA Ethical Rules ■ Problem clients. 4 hrs. of Oregon Ethics CPE credit. Level: Update, 4 hours \$115\*(1)

**General Interest Courses** - Visit [www.brownbagcpe.com](http://www.brownbagcpe.com) for full course descriptions.

### **Half Day Courses:**

**Advising Family Businesses** - Family business advisers need specific skills. Learn about problems unique to family businesses ■ How to write a formal succession plan ■ Income tax and estate tax issues. Level:Basic, 4 hours \$115\*(1)

**Advising the Start-up Business** - Become a more effective adviser to your start-up clients. ■ Help clients with start-up decisions including choice of entity & setting up accounting and business systems ■ Learn to anticipate common operating problems ■ Develop a formal business plan ■ Spot common ethical traps. Level:Basic, 4 hours \$115\*(2)

**Foreclosure in Oregon & Washington** - Have clients in foreclosure? One in nine mortgages are in foreclosure or behind in payments. Learn the nuts and bolts of foreclosure before you need to advise clients. ■ Learn about local real estate law, mortgages, deeds of trust, local foreclosure procedures ■ Tax consequences. Level:Basic, 4 hours \$115\*(4)

**Life Insurance: What CPAs and Attorneys Need to Know** - Every CPA and attorney needs a working knowledge of life insurance to evaluate how it fits into clients' financial plans. Be ready to advise your clients about basic life insurance issues ■ Covers new sophisticated life insurance as well as basic products ■ Beneficiary designations ■ How to decipher confusing policy illustrations ■ Specific tax and non-tax planning strategies. Level:Basic, 4 hours \$115\*(3)

**Sustainability: Practical Methods for CPAs** - Learn sustainability reporting before your clients ask you about it. Learn now how to incorporate sustainability principles into your practice and your clients' businesses. Includes: Triple bottom line accounting ■ Metrics ■ CPA reporting requirements, and more. Level:Basic, 4 hours \$115\*(2)

**Tax Losses from A to Z** - The current recession has made tax loss planning essential. This course reviews over a dozen common and not-so-common tax losses including ■ Abandonment losses ■ Bad debt losses ■ Bankruptcy ■ and Net operating losses. Be ready to help your clients find a silver lining in their losses. Level:Basic, 4 hours \$115\*(1)

**Tax Planning in an Unstable Real Estate Market** - Local values have fallen! Covers Mortgage Traps ■ Cancellation of Debt income ■ Passive Activity Loss rules ■ 2009 Changes to Vacation Home sales. Level:Basic, 4 hours \$115\*(1)

**Tax Return Preparer Penalties: The New Rules** - The IRS has raised the stakes for taking aggressive tax positions. Penalties can be \$1000-\$5000 per return ■ Learn:Who is a preparer ■ What returns are covered ■ When penalties apply ■ Reasonable cause exception ■ Liability for oral advice ■ Disclosure rules. Level:Basic, 4 hours \$115\*(1)

### **Full Day Courses:**

**Take two courses and save! Sign up for two half day courses and get 8 hours of CPE for \$175!**

### **Information:**

\***Instructors:** (1)Jim Jurinski, Attorney/CPA  
(3) Mike Radakovich, CLU, ChFC, CFP

(2) Brian C. Setzler, CPA, MBA  
(4) John Oreskovich, JD

### **Spring Course Locations:**

#### **Oregon**

**Portland:** Bank of America Financial Center,  
SW Morrison, Portland, OR 97204

**Lake Oswego:** 4004 Kruse Way Place Building,  
4004 Kruse Way Place, Lake Oswego, Or 97235

**Salem:** Chemeketa Community College,  
4001 Winema Place NE, Suite 200, Salem, OR 97305

#### **Washington**

**Vancouver:** The Marshall House,  
1301 Officer's Row, Vancouver, WA 98661

### **Registration:**

**To Register:** Mail us this form, or visit [www.brownbagcpe.com](http://www.brownbagcpe.com) for full course descriptions and use on-line registration form.

**Payment:** By check or PO.

**Cancellations:** Changes or refunds if request received or emailed 5 business days before class.

**Lunch:** Bring a brown bag lunch (beverages provided) or eat out nearby.

**Questions:** Email us at [customerservice@brownbagcpe.com](mailto:customerservice@brownbagcpe.com) or Call (503) 222-3200.

## **Live CPE Classes in Oregon & Washington Spring 2009**

<b>Registration Form</b>	<b>Cost</b>	<b>Site</b>	<b>CR</b>
<input type="checkbox"/> 05/21/09 8:15-12:00 <b>Professional Conduct and Ethics for Oregon CPAs #2 - Salem</b>	\$115	Salem	4
<input type="checkbox"/> 05/21/09 1:00-4:45 <b>Tax Return Preparer Penalties: The New Rules #2 - Salem</b>	\$115	Salem	4
<input type="checkbox"/> 05/21/09 8:15-4:45 <b>Prof. Ethics for Oregon CPAs #2 &amp; Tax Ret. Preparer Penalties #2</b>	\$175	Salem	8
<input type="checkbox"/> 05/28/09 8:15-12:00 <b>Professional Conduct and Ethics for Oregon CPAs #3</b>	\$115	Port.	4
<input type="checkbox"/> 05/28/09 1:00-4:45 <b>Tax Return Preparer Penalties: The New Rules #3</b>	\$115	Port.	4
<input type="checkbox"/> 05/28/09 8:15-4:45 <b>Prof. Ethics for Oregon CPAs #3 &amp; Tax Ret. Preparer Penalties #3</b>	\$175	Port.	8
<input type="checkbox"/> 06/02/09 8:15-12:00 <b>Tax Losses from A to Z #2</b>	\$115	Port.	4
<input type="checkbox"/> 06/02/09 1:00-4:45 <b>Life Insurance: What CPAs and Attorneys Need to Know</b>	\$115	Port.	4
<input type="checkbox"/> 06/02/09 8:15-4:45 <b>Tax Losses from A to Z #2 AND Life Insurance</b>	\$175	Port.	8
<input type="checkbox"/> 06/05/09 8:15-12:00 <b>Advising the Start-up Business</b>	\$115	Port.	4
<input type="checkbox"/> 06/05/09 1:00-4:45 <b>Advising Family Businesses: Tips &amp; Techniques #2</b>	\$115	Port.	4
<input type="checkbox"/> 06/05/09 8:15-4:45 <b>Advising the Start-up Business &amp; Advising Family Businesses #2</b>	\$175	Port.	8
<input type="checkbox"/> 06/12/09 8:15-12:00 <b>Sustainability: Practical Methods for CPAs #2</b>	\$115	Port.	4
<input type="checkbox"/> 06/12/09 1:00-4:45 <b>Tax Planning in an Unstable Real Estate Market #2</b>	\$115	Port.	4
<input type="checkbox"/> 06/12/09 8:15-4:45 <b>Sustainability #2 &amp; Tax Planning in an Unstable Real Estate Mkt. #2</b>	\$175	Port.	8
<input type="checkbox"/> 06/25/09 8:15-4:45 <b>Foreclosure in Oregon &amp; Washington</b>	\$115	Port.	4
<input type="checkbox"/> 06/25/09 1:00-4:45 <b>Ethics In Tax Practice</b>	\$115	Port.	4
<input type="checkbox"/> 06/25/09 8:15-4:45 <b>Foreclosure in Oregon &amp; Washington &amp; Ethics In Tax Practice</b>	\$175	\$175	8
<input type="checkbox"/> 06/30/09 8:15-12:00 <b>Professional Conduct and Ethics for Washington CPAs #1</b>	\$115	Vanc.	4
<input type="checkbox"/> 06/30/09 1:00-4:45 <b>Professional Conduct and Ethics for Oregon CPAs #4</b>	\$115	Vanc.	4

**BrownBagCPE Spring Course Locations:**

**Portland, Oregon:** Bank of America Financial Center

**Vancouver, Washington:** The Marshall House

**Visit [www.brownbagcpe.com](http://www.brownbagcpe.com) for course details and registration or mail us this form.**

**Please include your email address so we may quickly confirm your registration.**

**Enclose check payable to: BrownBagCPE**

**Mail to: BrownBagCPE, 121 SW Morrison, Suite 1020; Portland, Oregon 97204**

Name \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

Total Enclosed \$ \_\_\_\_\_

Do you wish to receive an email notice of our new course schedule? Yes:  No:

❖ Thank you for registering. ❖