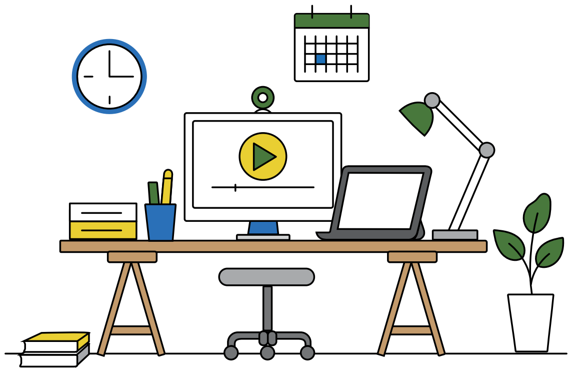
McGOWAN
Professional Liability

LIVE RISK MANAGEMENT WEBINAR SERIES



McGowan Professional, in collaboration with the CPAOnePro Accountants Professional Liability Program, is pleased to offer the 2025 Live Risk Management Webinar Series for all McGowan Professional clients and friends. These exclusive webinars are designed to provide CPA firms with valuable risk management insights, presented by leading experts in the accounting profession. Each live session offers **1 hour of free CPE credit** for attendees. Participation in the series may also qualify your firm for a **premium credit** toward its professional liability insurance. Please contact your broker for details and be sure to register today!

New This Year: We've Switched to LCvista for CPE Certificate Management!
All webinar registrations and CPE certificates will now be handled through the **LCvista platform**. When you click the registration buttons below, you'll be prompted to **sign in** or **create an LCvista account with McGowan Professional**.

May 27, 2025
1PM EST

Presenters:
Jeremy Monosov, Esq and Rocco Malandrino

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Claims Stories, The Not So Good, The Bad and The Ugly. (1 CPE)

Course Description:

Listen to what an insurance company attorney, who defends claims against 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 kinds of claims are most frequent, and what the real cost of a claim is. The presenters will tell you that the cost is not just dollars. Claim examples and what accountants can do to minimize those claims will be presented.

Learning Objectives:

- Participants will gain an understanding of the types of claims accounting firms experience.
- Participants will be exposed to risk avoidance lessons learned from the claim's examples presented.

REGISTER HERE

June 13, 2025
1PM EST

Presenter:
Mark Stone

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

How to Handle a Sales Tax Audit (1 CPE)

Course Description:

In this presentation, How to Handle a Sales Tax Audit, Mark L. Stone, CPA, MST, the Managing Partner of Sales Tax Defense LLC goes in for a deep dive into one of the most anxiety-inducing issues a business can face: the dreaded sales tax audit.

With over 20 years of experience exclusively in sales and use tax, Mark Stone shares invaluable insights and practical strategies to help businesses, CPAs, and legal professionals understand how audits are triggered, how to prepare, and—most critically—how to respond.
From documentation best practices to options available to contest the findings of the State Department - the webinar covers real-world case studies and actionable advice for minimizing liability and avoiding costly penalties.

Whether you're a seasoned CPA or a business owner trying to keep your books in order, this session equips you with the tools to protect your business and be prepared if you are ever selected for a sales tax audit. Don't wait until the audit letter arrives, prepare now with the guidance of one of the nation's top sales tax experts.

Learning Objectives:

- Participants will gain an understanding of what triggers an IRS audit.
- Participants will gain an understanding of how to prepare and respond to an IRS audit.
- Participants will learn risk management tools to minimize their exposure to claims against them.

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June 20, 2025
1PM EST

Presenter:
Randy Crabtree

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Cultivating Culture for Optimum Firm Growth (1 CPE)

Course Description:

Achieving an optimum level of growth in your firm requires more than vision. It requires a strong, synergistic team aligned with processes and practices that will keep your firm on track to meet short- and long-term goals.

In this session, Randy Crabtree, The Unique CPA and co-founder of Tri-Merit Specialty Tax Firm (named one of the Inc., 5000 Fastest Growing Businesses), will share the specific strategies and practical steps that he and his team have taken to cultivate a culture that optimizes growth and has enabled them to grow revenue exponentially over the past six years.

Learning Objectives:

- Create your firm culture and learn how it can support your firm's growth.
- Determine the cultural aspects that will help to set the foundation for optimum firm growth.
- Learn seven key areas that support firm growth.
- Develop a plan to put the right people, processes, pricing, and products in place to achieve your goals.

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July 10, 2025
1PM EST

Presenter:
Rob Ferrini and Joseph Harford

Delivery Method:
Group Internet-Based

Field of Study:
Information Technology

Data Breach/Cyber Best Practices (1 CPE)

Course Description:

In this updated presentation, Rob Ferrini will be joined by Joseph Harford, President & Founder of Reclamere, Inc. They will bring their experience counseling clients on cyber security and insurance to a discussion on how to best protect your organization's brand, value, and assets in the face of a challenging insurance market, ever-growing attacks on accounting firms, and increasing cyber security requirements. Joseph and Rob will also provide practical steps your firm can take to reduce cyber risk with proven security measures and how to qualify for comprehensive Cyber Insurance coverage.

Learning Objectives:

- Gain knowledge on steps to protect your client's personal information.
- A better understanding of using resources available in a Cyber Liability insurance policy.
- How a cyber liability insurance policy helps you in compliance with State Information Security Laws.

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July 15, 2025
1PM EST

Presenters:
Nancy Damato and Stacie Malgieri

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Effective Recruiting and Retention Strategies for CPA Firms (1CPE)

Course Description:

In today's competitive accounting landscape, attracting top talent and keeping staff engaged requires more than just a compelling job offer; it demands a strategic marketing approach tailored to highlight your firm's unique culture, values, and opportunities for growth. Join Nancy Damato, President and Senior Consultant, and Stacie Malgieri, Digital Marketing Consultant at Accountants Advisory Group, for an insightful webinar to explore innovative marketing strategies to captivate the interest of potential candidates. Nancy and Stacie will also address how your firm can foster a workplace environment that encourages long-term engagement and loyalty among current employees.

Learning Objectives:

- Discover how employer branding and firm culture can help attract qualified candidates who are culturally aligned.
- Learn how to develop compelling recruiting content across your website, social media, and job listings.
- Explore ways to effectively use social media to connect with candidates and showcase your firm's culture.
- Understand how to empower employees to advocate for your firm and strengthen your employer brand.
- Gain insights into using metrics and analytics to evaluate and improve your recruiting strategies.

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July 30, 2025
1PM EST

Presenters:
Nancy Riemer and Patrick Cosgrove

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Private Equity in Accounting: Risks Encountered in a New Era of Ownership and Influence (1 CPE)

Course Description:

Recently, accounting firms, big and small, have seen the growing influence of private equity firms investing in and acquiring accounting practices. In this webinar presentation, attorneys Nancy Reimer and Patrick Cosgrove of Freeman Mathis & Gary, LLP will focus on this growing trend and the accompanying risks on firm ownership, independence, and the general practice of accounting. Join this webinar to learn how your firm should be considering these risks and best practices to mitigate potential legal liabilities.

Learning Objectives:

- Participants will learn about the growing changes in the accounting profession as it relates to Private Equity Firms investing and acquiring accounting firms.
- Participants will gain an understanding of risk management and ways to mitigate potential exposures as it relates to PE ownership of an accounting firm.

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August 5, 2025
1PM EST

Presenter:
Ralph G. Picardi, Esq.

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Risk Management for Accountants—Part 1 (1 CPE)

Course Description:

This is an updated 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).

Learning Objectives:

- Gain an overview of the landscape of risk and legal exposures that accountants operate in.
- Obtain knowledge of the steps to mitigate risk and exposure.

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August 19, 2025
1PM EST

Presenter:
John F. Raspante, CPA, CDFA, MST

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Engagement Letters A to Z (1 CPE)

Course Description:

Engagement Letters are a very important tool in any CPA's risk management toolbox! Many times, well-written engagement letters have stopped a claim from happening. In this updated 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.

Caveats will be discussed to address the rapid changes in both tax and A&A. Included will be clauses to manage the impact of the Way Fair decision, Pass-through entity taxes, and Cannabis.

Learning Objectives:

- Understanding the importance of the engagement letter as a risk management tool.
- Develop a better understanding of the importance of certain protective language in an engagement letter.
- Understand the deductible incentives from your professional liability insurance when an engagement letter is used.

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September 9, 2025
1PM EST

Presenters:
Joe Jones and Kristin Montalvo

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Legal Liability: Duty, Damages and Defenses (1 CPE)

Course Description:

Legal Liability for accounting professionals can take many forms. Join us as presenters Joe Jones and Kristin Montalvo of Travelers Insurance, a major insurer of accountant's professional liability insurance, guide us through how duty is established for legal liability, what damages accounting professionals could be liable for and what possible defenses may be available. The team of Joe the attorney and Kristen the underwriter both bring their perspectives for this ever popular and useful presentation!

Learning Objectives:

- Gain an understanding of how duty is established for legal Liability.
- Gain an understanding of what damages accounting professionals could be liable for.
- Gain insights into using metrics and analytics to evaluate and improve your recruiting strategies.

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September 24, 2025
1PM EST

Presenters:
Kenn Heaslip, CPA, MS, CGMA

Delivery Method:
Group Internet-Based

Field of Study:
Audit

What's New in Independence? (1 CPE)

Course Description:

The AICPA continues to clarify and address independence when CPAs perform attest services. In this one-hour session, top-rated instructor Kenn Heaslip of Kenn Heaslip Seminars, LLC discusses the framework for independence that everyone in an accounting firm needs to be aware of. Kenn will discuss the standards related to performing management responsibilities. Among the topics discussed will be new interpretations on staff augmentation, beneficial owners of clients, hosting, implementation services, and unpaid fees. The program will focus on building your accounting firm's independence compliance policy.

Learning Objectives:

- Gain an understanding of current AICPA independence guidelines.
- Participants will gain insight into risk management tools to lower their risk of being non-compliant with AICPA independence rules.

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October 3, 2025
1PM EST

Presenter:
Peter Larkin, Esqu.

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

The client selection process, stopping a claim before it happens. (1 CPE)

Course Description:
In this webinar presentation, accounting firm defense attorney Peter Larkin of the Law firm Wilson Elsner, shares why the client selection and onboarding process is so important in mitigating legal exposures before they even happen. Best Practices in the selection process will be discussed.

Learning Objectives:
- Gain an understanding of the processes of selecting clients that fit your accounting firm.
- Obtain knowledge of the steps to mitigate risk and exposure.

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October 21, 2025
1PM EST

Presenter:
Ralph Picardi

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Risk Management for Accountants—Part Two (1 CPE)

Course Description:
This 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 matters of professional liability, picks up where Part One left off. Topics include, among others, general principles of defending claims, exposure to clients, exposure to third parties, and reporting claims/incidents to insurers.

Learning Objectives:
- Gain an overview of the landscape of risk and legal exposures that accountants operate in.
- Obtain knowledge in steps to mitigate risk and exposure.

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November 4, 2025
1PM EST

Presenters:
Madison Fatcheric

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Laws and Trends Affecting the Workplace (1 CPE)

Course Description:
Employment laws can be confusing, and not being in compliance can create legal exposure for employers. New employment laws are coming to fruition on everything from minimum wage to cannabis use and have led to a surge in employment litigation. Join us as presenter Madison Fatcheric of USLI Insurance discusses these new laws, claim trends, and risk transfer through the use of employment practices liability insurance, as well as risk management support that helps lower your legal exposures.

Learning Objectives:
- Gain a greater understanding of how employment laws affect the workplace and possibly the culture of your firm.
- Learn risk mitigation tools to lower your legal exposure.
- Understand the resources available to employment practices liability insurance policyholders.

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November 12, 2025
1PM EST

Presenters:
Rob Ferrini

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Are You fully insured For That Exposure? (1 CPE)

Course Description:
In this updated 50-minute presentation, Rob Ferrini walks the listener through the coverage of each insurance policy that a professional 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.

Learning Objectives:
- Understanding the different risks and exposures that need to be mitigated by the accounting profession.
- How using the different insurance policies transfers your risk and mitigates loss when you have a claim.

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December 9, 2025
1PM EST

Presenter:
Anthony Carolei

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Risk Management Lessons learned from the Top 100 accounting firms (1 CPE)

Course Description:

In this webinar, listen to what an insurance company Director of Risk Management has to share about risk management lessons learned from the Top 100 accounting firms. Presenter Anthoney Carolei of Hanover Insurance will discuss risk management behaviors from some of the large accounting firms and help to translate these practices to smaller firms. Topics will focus on cultivating, maintaining and terminating client relationships.

Learning Objectives:

- Gain an understanding of best practices concerning client relationships.
- How to mitigate legal exposure created by lack of cultivating and maintaining client relationships.

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December 16, 2025
1PM EST

Presenter:
Randy Crabtree

Delivery Method:
Group Internet-Based

Field of Study:
Business Management & Organization

Tax update (1 CPE)

Course Description:

In this session, Randy Crabtree, The Unique CPA, and co-founder of Tri-Merit Specialty Tax Firm (named one of the Inc. 5000 Fastest Growing Businesses), will share an update on any new laws that will affect your tax practice. Randy will also share what to be aware of to mitigate your legal exposure.

Learning Objectives:

- Gain a better understanding of any new tax code.
- How to mitigate legal exposure created by new tax codes.

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CONTACT

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