

# Webinar Series Loss Control & Risk Management



McGowanPRO and the CPAOnePro Accountants Professional Liability Program are pleased to offer the following Live Risk Management Webinar Series for all CPAOnePro clients. These exclusive webinars offer clients valuable risk management tools that are being presented by experts in the accounting industry. Each live Webinar gives the attendee 1 hour of free CPE credit. The series can also provide a premium credit towards the firm's professional liability coverage. Please ask your agent for more details and register today.

## SESSION 2

### **Staying Ahead of The Bad Actors, Part 2: Has your firm done all it can to reduce your DATA BREACH risk? Are you sure? (1 CPE)**

Rob Ferrini

A cyber-attack can shut down a business's operations for days, even weeks or even force you to close your doors. Your firm's systems and important data can be compromised and be of little value in the response and recovery phases of the disaster and a cyber-attack can wreak havoc to your firm's reputation and have unforeseen legal implications.

During this session, Rob Ferrini will be talking with Bill Minahan of aNetworks, about how your firm can align business technology to security standards to attain near perfect protection and recovery capabilities. How your firm can better prepare and safeguard against a cyber/data breach. Why an updated response plan, vulnerability testing, proactive threat hunting and threat detection response strategies can help protect your firm survive a data breach.

July 28 @ 1 PM EST

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## SESSION 3

### **1031, Risk and Rewards for Your Clients (1 CPE)**

Jackline Barbera, Vice President, Private Capital Inland Securities Corporation

This webinar provides an overview of the IRS Section 1031 Exchange. It also summarizes the concept of 'like-kind' real estate, the DST, advantages of owning commercial real estate through fractional ownership, passive income and passive losses, and Substitute 1099 & 1098 reports. Examples of 1031 exchanges are also provided, as well as a snapshot of Inland Private Capital Corporation. No advance preparation is required. Prerequisite(s): none. There is no fee to attend this webinar.

August 12 @ 1 PM EST

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## SESSION 4

### Risk Management and Loss Control, Emerging Trends (1 CPE)

Stephanie Sessions, Esq.

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“What services will I provide?” “How will I deliver those services?” “How will I choose my clients?” These are just a handful of the questions every CPAs must ask themselves when navigating the risks and rewards inherent in practice.

Every decision a CPA makes has risk implications. Simply put, today’s CPAs, regardless of their practice size, face a myriad of challenges when managing the broad range of potential challenges and risks inherent in their day-to-day practice responsibilities. That isn’t to say the reward isn’t worth the right risk, but how do you know where the line is and what to do to reduce legal implications? These decisions do not have to be overwhelming. Understanding those risks and implementing effective risk management tools is a huge step in building your practice management confidence, to implementing sound decisions and to reducing potential legal exposure.

In this course, you’ll gain important insights into emerging areas of exposure for the profession, such as reputational risk, data security risk, operational and financial services risk. You’ll come away from the course knowledgeable about some of the “war stories” and experience of others. This will enhance your ability to identify and evaluate the risk implications of your decisions, as well as provide you with practical insight and tips to help you implement various tried and true strategies and best practices to refine your risk management skills and to respond to risk appropriately.

**August 25 @ 1 PM EST**

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## SESSION 5

### Managing Your Clients’ Information and Legal Implications (1 CPE)

Eric Hess, Esq. of Helical LLC

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In this session, Eric Hess will present legal implications of managing your clients information. Business continuity planning, pandemic planning, telecommuting (and associated security risks), and vendor risk management will be discussed.

**September 17 @ 1 PM EST**

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## SESSION 6

### HIPAA: The Health Insurance Portability & Accountability Act in the Coronavirus Era (1 CPE)

Mark O. Dietrich, CPA

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HIPAA impacts virtually every area of practice for CPAs who work with healthcare industry clients, right down to the QuickBooks or other general ledger package. Firms who do specialized consulting in this area are even more likely to confront critical HIPAA issues, as are valuation and litigation experts.

Although basic HIPAA rules have not changed since the implementation of the HITECH Act in late 2013, in response to the COVID-19 pandemic, HHS announced major changes to the enforcement of HIPAA compliance in 2020, which will remain in place for the duration of the nationwide public health emergency. Business Associates—which typically include CPAs with healthcare clients—are granted special waivers from the prohibition against disclosing HIPAA-covered data to the likes of Federal public health authorities and health oversight agencies. In addition, the rapid expansion of telehealth services—medical services via telephone or video-modalities such as Zoom—is a critical factor that CPAs should be familiar with when advising healthcare clients.

In addition to current developments, this webinar will look at the regulatory update process that was in motion before COVID-19 as well as the recent history of enforcement actions before the Pandemic.

**September 24 @ 1 PM EST**

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