

## Fall 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 7

#### Risk Management For Accountants, Part 1 (1 CPE)

Ralph Picardi

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 matters of professional liability. 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).

October 20 @ 1 PM EST

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### SESSION 8

#### Can Accountants Offer Clients Both Security and Convenience Online? (1 CPE)

A fireside chat with Rob Ferrini and Chris Farrell

Remote work, a new generation of tech-savvy clients, and new technology are reshaping the accounting profession. Rob Ferrini of McGowanPRO and Chris Farrell of Liscio sit down to discuss how successful firms are rapidly adapting. Join them for a free 60-minute fireside chat that covers topics ranging from current online threats, to successfully serving clients of every generation.

Chris Farrell is CEO of Liscio. Chris has more than 25 years of experience in the accounting, finance, and software industries. Prior to Liscio, he was the CEO of SpringAhead and Tallie. He also served as the CFO of Occam Networks, the Corporate Controller of C-Cube Microsystems and as an auditor for Arthur Andersen. He holds a Masters in Business Administration from UCLA's Anderson School of Management and received his CPA license in California. Chris lives with his wife and son in San Francisco, California.

November 3 @ 1 PM EST

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## SESSION 9

### Engagement Letters A to Z (1 CPE)

John F. Raspante, CPA, CDEFA, MST, McGowanPRO's Director of Risk Management

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In this 50-minute presentation, John Raspante will build on some of Ralph Picardi's preceding presentation and dive a little deeper into the importance of engagement letter usage, discussing among other things, caveats and language to help stop a claim before it happens. Engagement letters are considered a first line of defense in lowering exposure to litigation, learn how to make your letters more robust. COVID-19 issues in relationship to engagement letters to be discussed as well.

**November 4 @ 1 PM EST**

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## SESSION 10

### Emerging Trends in Claims (1 CPE)

John F. Raspante, CPA, CDEFA, MST, McGowanPRO's Director of Risk Management

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In this 50-minute presentation, John Raspante will discuss the changes in the environment in claims against accountants including the Wayfair Nexus ruling, COVID-19, and other emerging exposures.

**November 17 @ 1 PM EST**

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## SESSION 11

### Risk Management For Accountants, Part Two (1 CPE)

Ralph Picardi

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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 matters of professional liability. Topics include, among others, general principles of defending claims; exposure to clients; exposure to third parties; and reporting claims/incidents to insurers.

**December 9 @ 1 PM EST**

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