



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 McGowanPRO clients and friends. These exclusive webinars offer CPAs valuable risk management tools that experts in the accounting profession are presenting. Each live Webinar 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 8 @ 1 PM
[REGISTER HERE](#)

SESSION 1: Employee Retention Credit Under The CARES Act; What All CPAs need to know. (1 CPE)
Presenter: Randy Crabtree

Presenter Randy Crabtree, CPA, of Tri-Merit, will guide you through the Employee Retention Credit (ERC) and its legal implications. What do the CPA and his/her team need to know about the intricacies of this incentive under the CARES act? Randy will also discuss how to lower your legal exposure while performing ERC services.

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

JUNE 24 @ 1 PM
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SESSION 2: Data Breach/Cyber - Tricks, Tips and Best 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 insurance options available and 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

JULY 6 @ 1 PM
[REGISTER HERE](#)

SESSION 3: 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

In this presentation, we 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, Employee Retention Credit, Restaurant Revitalization Program, and other topics.

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

JULY 21 @ 1 PM
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SESSION 4: The Pandemic, a Deeper Look. (1 CPE)
Presenter: John F. Raspante, CPA, CDFA, MST, McGowanPRO's Director of Risk Management

The current pandemic has wreaked havoc in many industries that CPAs work with. What are the legal exposures that CPAs face due to the pandemic? Our presenter, John Raspante, CPA will take a deeper look at the response and responsibilities of the accounting profession as a result of the pandemic. Topics of discussion are The Cares Act, Paycheck Protection Program, Employee Retention Credit, Economic injury disaster loans, and the restaurant revitalization fund will be the areas of focus.

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

AUGUST 18 @ 1 PM
[REGISTER HERE](#)

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

SEPTEMBER 15 @ 1 PM

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SESSION 6: Managing Your Client's Personal Information (1 CPE)

Presenter: Eric Hess, Esq., of Helical LLC

This webinar is an engaging source of critical information that will help your firm take control of its security in the face of an ever-changing landscape. Participants will come away with a clear picture of remote work security risks and their impact on their clients, as well as the most effective steps to mitigate them. They will receive actionable advice on creating resilient security that not only complies with the FTC Safeguards Rule but builds layered protection against the most common attack varieties.

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

SEPTEMBER 22 @ 1 PM

[REGISTER HERE](#)

SESSION 7: Accounting Malpractice Trends in The Era of COVID-19 (1 CPE)

Presenter: Hope Everett

Take a trip down to the courthouse in this 1-hour presentation by Hope Everett of RMWBH Law. Hope will address the trends seen throughout the COVID-19 pandemic in accounting liability. She will also discuss prior cases that may shine a light on what to expect as the litigation process ramps up when the COVID-19 pandemic comes to an end.

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

OCTOBER 20 @ 1 PM

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SESSION 8: Risk Management For Accountants—Part Two (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. 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

NOVEMBER 3 @ 1 PM

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SESSION 9: 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. Items to be addressed include language for PPP Loans, Employee Retention Credit (ERC), Restaurant Revitalization Program, and much more!

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

NOVEMBER 16 @ 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:** Business Management & Organization

DECEMBER 8 @ 1 PM

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SESSION 11: Claims Stories, The Not So Good, The Bad and The Ugly—Part 1 (1 CPE)

Presenter: Joseph H. Jones, Jr., Esq. & Erin Singmaster, RPLU+

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, Joseph Jones, Esq. and Erin Singmaster of Travelers Insurance, will share why claims happen, what kind of claims are most frequent and what the real cost of a claim is. The presenters will tell you the cost is not just dollars. Claim examples and what accountants can do to minimize those claims will be presented.

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

DECEMBER 15 @ 1 PM

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SESSION 12: Claims Stories, The Not So Good, The Bad and The Ugly—Part 2 (1 CPE)

Presenter: Jeremy Monosov, Esq. & Rocco Malandrino

In this 50 minute session, presenters Jeremy Monosov and Rocco Malandrino of Navigators Insurance, part of The Hartford, will continue with a slightly different perspective of Part One of the Claims Stories presentation. More claims stories and risk management tools to be shared.

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

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

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